Pigments: Inorganic, Organic & Specialty


Study #2232 | August 2007 | $4500 | 275 pages
Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT
- General ............................................. 4
- Macroeconomic Overview .................. 4
- Consumer Spending & Income Patterns ... 8
- Manufacturing Outlook .................... 11
- Regulatory Environment ................... 13
- Pollution Control Issues .................... 14
- Consumer & Worker Safety Concerns .... 15
- Historical Market Trends .................. 16
- Foreign Trade .................................... 19
- Imports .......................................... 20
- Exports .......................................... 24
- International Activity ....................... 26

OVERVIEW
- General ........................................... 28
- Colorant Industry Outlook ............... 29
- Demand by Color Group .................... 33
- Red Pigments .................................... 35
- Yellow Pigments ................................ 36
- Blue & Green Pigments ................. 36
- Other Pigments ............................... 37
- Demand by Pigment Type ............... 37
- Pricing .......................................... 40

INORGANIC PIGMENTS
- General ........................................... 43
- Demand by Market ......................... 45
- Demand by Type .............................. 46
- Special Carbon Black ..................... 48
- Complex Inorganic ......................... 51
- Iron Oxide ...................................... 53
- Ultramarine .................................... 56
- Chromium Oxide ............................. 60
- Chromate ....................................... 61
- Cadmium ........................................ 63
- Other Inorganic .............................. 65

ORGANIC PIGMENTS
- General ........................................... 68
- Demand by Market ......................... 70
- Demand by Type & Grade ............... 72
- Azo .............................................. 74
- Phthalocyanine ............................... 77
- Quinacridone .................................. 80

SPECIALTY PIGMENTS
- General ........................................... 87
- Demand by Market ......................... 88
- Demand by Type .............................. 90
- Metallic .......................................... 91
- Markets ......................................... 94
- Suppliers ....................................... 97
- Luminescent .................................... 98
- Daylight Fluorescent ...................... 99
- Other ............................................ 100
- Pearlescent .................................... 101
- Transparent .................................... 103
- Other Specialty .............................. 105

PIGMENT DEMAND BY MARKET
- General ........................................... 109
- Paints & Coatings ............................ 111
- Paints & Coatings Industry Overview ... 112
- Pigment Demand ............................. 113
- Architectural .................................... 116
- Durable Equipment ......................... 118
- Special Purpose ............................... 121
- Printing Inks ................................... 123
- Printing Inks Industry Overview ........ 124
- Pigment Demand ............................. 127
- Conventional Printing Inks ............. 129
- Specialty Printing Inks .................... 131
- Digital Inks .................................... 135
- Plastics ......................................... 137
- Plastics Industry Overview .............. 138
- Pigment Demand ............................. 139
- Ceramics, Glass & Minerals ............. 143
- Ceramic, Glass & Mineral Industry Overview .... 144
- Pigment Demand ............................. 145
- Ceramics ........................................ 146
- Glass ............................................ 147
- Minerals ........................................ 147
- Textiles & Leather ......................... 150
- Textile & Leather Industry Overview ... 150
- Pigment Demand ............................. 152
- Toner ............................................ 155
- Toner Industry Overview ................. 155
- Pigment Demand ............................. 156

INDUSTRY STRUCTURE
- General ........................................... 172
- Market Share .................................... 175
-sun Chemical .................................. 176
- BASF ............................................. 176
- Ciba Specialty Chemicals ............... 177
- Clariant International ..................... 178
- LANXESS ....................................... 179
- Other ............................................ 179
- Inorganic Pigments ....................... 180
- Organic Pigments ........................... 183
- Specialty Pigments ....................... 185
- Pigment Concentrates ..................... 187
- Mergers & Acquisitions ................. 189
- Competitive Strategies ................. 192
- Product Differentiation ................. 194
- Product Specialization ................. 194
- Cooperative Agreements ............... 195
- Research & Development ............... 198
- Manufacturing ............................. 199
- Marketing & Distribution .............. 201

COMPANY PROFILES
- ALTANA AG ................................. 203
- Apollo Colors ............................... 206
- BASF AG ....................................... 207
- Cabot Corporation ......................... 211
- Ciba Specialty Chemicals ............... 213
- Clariant International ................. 216
- Columbian Chemicals ................. 220
- DaiNihon Ink & Chemicals ............ 222
- Dainippon Ink and Chemicals ......... 224
- Elementis plc ............................... 228
- European Colour ........................... 230
- Ferro Corporation .......................... 231
- Flint Group .................................. 233
- Freeport-McMoRan Copper & Gold ... 235
- Heubach GmbH ......................... 236
- Honeywell International .............. 238
- JDS Uniphase ............................... 239
- LANXESS AG ............................... 241
- Lubrizol Corporation .................... 243
(continued on next page)
List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table ........................................... 3

MARKET ENVIRONMENT

1 Macroeconomic Overview ......................... 8
2 Consumer Spending & Income Patterns ............ 10
3 Manufacturers’ Shipments ......................... 13
4 Pigment Market, 1996-2006 ....................... 18
5 Pigment Supply & Demand ......................... 20
6 Cht Pigment Market, 1996-2006 ...................... 18
7 Cht Pigment Imports by Region, Value & Volume, 2006 ............................... 23
8 Cht Pigment Exports by Region, Value & Volume, 2006 ............................... 25
9 Cht World Pigment Demand, 2006 .................... 27

OVERVIEW

1 Colorant Demand by Type ............................. 31
2 Colorant Industry Flow Chart ....................... 32
3 Pigment Demand by Color Group .................... 34
4 Pigment Demand by Color Group, 2006 ............. 35
5 Pigment Demand by Type ............................. 39
6 Cht Pigment Demand by Type, 2006 .................. 40
7 Pigment Prices ............................................ 42

INORGANIC PIGMENTS

1 Inorganic Pigment Demand ............................. 44
2 Inorganic Pigment Demand by Market .......... 46
3 Inorganic Pigment Demand by Type  .......... 48
4 Special Carbon Black Pigment Demand by Market ........................................... 51
5 Complex Inorganic Pigment Demand by Market ........................................... 53
6 Iron Oxide Pigment Demand by Market .......... 56
7 Ultramarine Pigment Demand by Market .......... 59
8 Chromium Oxide Pigment Demand by Market .......... 61
9 Chromate Pigment Demand by Market .......... 63
10 Cadmium Pigment Demand by Market .......... 65
11 Other Inorganic Pigment Demand by Market ........................................... 67

ORGANIC PIGMENTS

1 Organic Pigment Demand ............................... 70
2 Organic Pigment Demand by Market .......... 72
3 Organic Pigment Demand by Type & Grade .......... 74
4 Azo Pigment Demand by Type & Market .......... 77
5 Phthalocyanine Pigment Demand by Type & Market ........................................... 80
6 Quinacridone Pigment Demand by Market .......... 82
7 Other Organic Pigment Demand by Market ........................................... 83

SPECIALTY PIGMENTS

1 Specialty Pigment Demand ............................. 88
2 Specialty Pigment Demand by Market .......... 90
3 Specialty Pigment Demand by Type .......... 91
4 Metallic Pigment Demand by Type & Market ........................................... 94
5 Luminescent Pigment Demand by Type & Market ........................................... 99
6 Pearlescent Pigment Demand by Market .......... 103
7 Transparent Pigment Demand by Market .......... 105
8 Other Specialty Pigment Demand ......... 108

PIGMENT DEMAND BY MARKET

1 Pigment Demand by Market ......................... 110
2 Paints & Coatings Shipments ....................... 113
3 Paints & Coatings: Pigment Demand by Type & Segment ......................... 116
4 Architectural Paint: Pigment Demand ............. 118
5 Durable Equipment Coatings: Pigment Demand ............. 121
6 Special Purpose Paints & Coatings: Pigment Demand ......................... 123
7 Printing Inks Production ......................... 126
8 Printing Inks: Pigment Demand by Type & Segment ......................... 129
9 Conventional Inks: Pigment Demand .......... 131
10 Specialty Inks: Pigment Demand .......... 135
11 Digital Inks: Pigment Demand .......... 137
12 Plastics Supply & Demand ......................... 139
13 Plastics: Pigment Demand by Type .......... 143
14 Ceramic, Glass & Mineral Product Shipments ............. 145
15 Ceramics, Glass & Minerals: Pigment Demand by Type ......................... 146
16 Textile & Leather Product Shipments .......... 152
17 Textiles & Leather: Pigment Demand by Type ......................... 154
18 Toner Production ......................... 156
19 Toner: Pigment Demand by Type .......... 158
20 Cosmetic & Toilettry Product Shipments ............. 161
21 Cosmetics & Toiletries: Pigment Demand by Type ......................... 164
22 Paper & Paperboard Production .......... 166
23 Paper & Paperboard: Pigment Demand by Type ......................... 168
24 Other Markets: Pigment Demand .......... 171

INDUSTRY STRUCTURE

1 US Pigment Sales for Selected Firms, 2006 ......................... 173
2 2006 US Pigment Sales by Company .......... 175
3 US Inorganic Pigment Sales by Company, 2006 ......................... 183
4 Cht US Organic Pigment Sales by Company, 2006 ......................... 185
5 Cht US Specialty Pigment Sales by Company, 2006 ......................... 187
6 Selected Acquisitions & Divestitures .......... 191
7 Selected Cooperative Agreements ... 197
US demand to grow 4.4% annually through 2011
Demand in the US for color pigments, including inorganic, organic and specialty types, is forecast to increase 4.4 percent per year to $3.8 billion in 2011, driven by a shift toward more expensive high-performance organic pigments and specialty types. Steady increases in large pigment markets such as paints and coatings will support volume growth. Trade continues to have a large impact on the US pigment industry (imports and exports account for about 25 percent of demand and production value, respectively). Imports mostly consist of lower-end pigments while higher-quality products are exported.

Specialty pigments to be fastest growing type
Specialty pigments, such as metallic and pearlescent types, will provide good opportunities, with demand growing at an annual rate of 5.5 percent to $640 million in 2011. Gains will arise from increased requirements for unique and novel eye-catching optical effects by manufacturers of products such as automotive coatings, printing inks, plastics, cosmetics and toiletries. Specialty pigments provide metallic tones and other special effects such as color-shifting that are increasingly popular in a broad range of consumer products. In addition, these pigments are used to create product packaging that differentiates manufacturers' products competing for shelf-space in retail establishments.

Organic pigments to post above-average gains
Organic pigments will also experience encouraging growth, resulting from trends toward more expensive, high-performance pigments and the continual displacement of heavy metal-based inorganic pigments such as chromate. Organic pigments have a superior environmental profile in comparison to inorganic pigments (and to some dyes) and provide a wider range of bright colors that are used in printing inks, a major outlet for organic pigments.

Inorganic pigments offer niche opportunities
Inorganic pigments will be the slowest growing segment through 2011, due to the continued phasing-out of heavy metal types and the increasing popularity of vivid colors with special effects, which are usually achieved with organic and specialty pigments. By 2011, demand for organic pigments will surpass that for inorganics, which was the largest segment for the past decade. Nevertheless, favorable opportunities exist for certain types of inorganics, such as complex inorganic pigments, which offer superior lightfastness and chemical resistance.
Pigments: Inorganic, Organic & Specialty
Industry Study with Forecasts for 2011 & 2016

Sample Text, Table & Chart

PIGMENT DEMAND BY MARKET

Pigment Demand -- Printing Inks
Demand for pigments in the printing ink market is forecast to increase 3.6% per year to $790 million in 2011, with a market volume totaling 182 million pounds at that time. Pigments can be used in the production of numerous printing inks, including conventional (e.g., flexographic, lithographic, gravure, letterpress), specialty and digital types. Conventional inks will continue to provide opportunities for pigments, particularly as flexographic types gain market share over gravure since the former require higher colorant loadings. Value gains will be driven by greater usage of specialty inks, where specialty pigments generally cost more than standard pigments. The production of specialty inks generally consists of the incorporation of expensive special effect pigments (e.g., metallic, luminescent). Pigment demand in the production of digital inks will benefit from a shift in formulation standards that favors pigments over dyes.

Three basic pigment colors -- yellow, magenta (called “process red”) and cyan (called “process blue”) -- along with black and white are utilized in the manufacture of inks. These hues are combined in a variety of ways to create every color in the spectrum.

Color is achieved in inks by either pigments or dyes; dyes are basically limited to uses in writing, security and digital inks, while the remainder of inks typically use pigments. Pigments can be used in ink formulations either as dry pigments, or in the form of color concentrates, where the pigment is dispersed in a medium, usually with additives. The choice between dry pigments and color concentrates is determined by the preference of the ink or toner maker.

Several types of pigments find use in the ink and toner industry. Special carbon blacks are the workhorse pigment for printing inks. Color inorganic pigments, such as chrome yellow, molybdenum orange, iron

TABLE IV-3
INORGANIC PIGMENT DEMAND BY TYPE
(million dollars)

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<td>Complex Inorganic</td>
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<td>220</td>
<td>280</td>
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Pigments: Inorganic, Organic & Specialty
Industry Study with Forecasts for 2011 & 2016

Sample Profile, Table & Forecast

COMPANY PROFILES

SICPA Holding SA
Avenue de Florissant 41
1008 Prilly
Switzerland
41-21-627-5555
http://www.sicpa.com

Annual Sales: $550 million (estimated)
Employment: over 1,000 (estimated)
Key Products: liquid crystal pigments

SICPA Holding is a global leader in the manufacture of security inks for banknotes and value documents. The privately held company operates through two businesses: Banknote and Document Security, and Product Security.

The company entered the US pigments industry through the July 2005 acquisition of Germany-based Wacker Chemie AG’s liquid crystal pigments business. The purchase included the production systems, patent and brand name rights to HELICONE and POLARSHIFT products for applications in the security printing, engraving, industrial and decoration markets. Following the sale, SICPA’s LCP Technology GmbH subsidiary (Germany) began producing and selling HELICONE products. In the US, LCP Technology sells HELICONE pigments through a representative in Norcross, Georgia.

LCP Technology’s HELICONE optical effect pigments are comprised of platelets of highly crosslinked liquid crystal polymer, and can be used for coatings, paints, plastics, inks, automotive, cosmetics, footwear, household appliance and other applications. HELICONE pigments provide iridescent effects, and are available in six color pairs.

"Azo pigment demand is projected to increase 4.0 percent per year to $560 million in 2011. Gains will be driven by favorable growth in the large inks market and expanding use in industrial coatings such as traffic paints and automotive coatings. Value growth will be spurred by increasing demand for high-performance azos (e.g., benzimidazolone) offering enhanced environmental acceptability and superior performance characteristics (e.g., heat stability and lightfastness) for industrial coatings. These newer and higher quality azo pigment have also been contributing to aggregate price increases. However, ..." -Section V, pg. 74

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TABLE V-4
AZO PIGMENT DEMAND BY TYPE & MARKET
(million dollars)

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<td>Organic Pigment Demand</td>
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<td>% azo</td>
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<td>Azo Pigment Demand</td>
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<td>By Type:</td>
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<td>Diazo</td>
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<td>Monoazo</td>
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<td>By Market:</td>
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<td>Paints &amp; Coatings</td>
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<td>Printing Inks</td>
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<tr>
<td>Other</td>
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<td>$/lb</td>
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Other Studies

Wood Protection Coatings & Preservatives
US demand for wood protection coatings and preservatives is analyzed in this study. It presents historical demand data (1996, 2001, 2006) and forecasts for the years 2011 and 2016 by type, product, market and geographic region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles major competitors.

#2243 ........................ 09/2007 ...................... $4500

World Enzymes
World demand for enzymes will grow 7.6% annually through 2011. Gains will be driven by continued robust growth in pharmaceutical enzyme demand, double-digit increases in demand for biocatalysts for drug and fine chemical production, and the rapid expansion in bioethanol production from grains. This study analyzes the $4.1 billion world enzyme industry, with forecasts for 2011 and 2016 by product, market, world region and for 15 countries. It also evaluates market share and profiles major players.

#2299 ........................ 09/2007 ...................... $5400

Specialty Silicas
This study examines US market for specialty silicas. It presents historical demand data (1996, 2001, 2006) and forecasts for 2011 and 2016 by silica type (e.g., precipitated, fumed, fused, gel, sol); and market (e.g., rubber, cosmetics and toiletries, coatings and inks, chemicals, plastics, electrical and electronic equipment, paper and textiles, food and beverages, agriculture and animal health, metals and refractories). This study also examines the market environment, evaluates market share and profiles major players.

#2233 ........................ 08/2007 ...................... $4400

World Carbon Black
World carbon black demand is forecast to rise 4.2% per year through 2011, bolstered by a healthy global rubber market. Special blacks will be the fastest growing market. The Asia/Pacific region, excluding Japan, will post the strongest gains. This study analyzes the 8.9 million metric ton world carbon black industry, with historical data and forecasts for 2011 and 2016 presented by product, market, world region and for 26 countries. The study also evaluates company market share and profiles major producers.

#2186 ........................ 05/2007 ...................... $5400

Advanced Ceramics
US advanced ceramics demand will grow 7% annually through 2010. Electronic components and electrical equipment will remain dominant but mature markets. The best opportunities for ceramics include ballistic armor, ceramic composite automotive brakes, diesel particulate filters, joint replacement products and piezoceramic sensors. This study analyzes the $8.6 billion US advanced ceramics industry to 2010 and 2015 by type, product and market. It also details company market share and profiles major producers.

#2134 ........................ 12/2006 ...................... $4400

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