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# World Flame Retardants

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Industry Study with Forecasts for **2011 & 2016**

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Study #2277 | December 2007 | \$5400 | 285 pages

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*Growth in flame retardant demand will be driven in part by the adoption of more stringent flammability regulations in developing countries and by the use of more plastic materials.*

## World demand to rise 4.7% annually through 2011

World demand for flame retardant chemicals will grow 4.7 percent per year to 2.2 million metric tons in 2011, valued at \$4.8 billion. Gains will be driven by the increased use of flame retardants in the developing countries of the world, as these nations begin to adopt more stringent flammability regulations, and the use of plastic materials rises. Additionally, more mature flame retardant markets such as the US and Western Europe will experience an acceleration in demand from the 2001-2006 period, due to an upswing in motor vehicle production and general manufacturing activity.

## Asia/Pacific region to stay largest market, lead gains

The Asia/Pacific region is the leading consumer of flame retardants, and will also be the fastest-growing region in the world, with demand rising more than seven percent per year through 2011. While China will account for much of the region's gains, countries such as South Korea and Taiwan will exhibit advances above the world average as well. Flame retardant demand will continue to benefit from the export of manufactured goods produced in Asia, since these products must meet the flammability standards of their country of destination. More moderate growth is expected for mature flame retardant markets in North America and Western Europe, although gains will still outpace those experienced from 2001 to 2006. Emerging markets in Latin



America, Eastern Europe and the Africa/Mideast region will all display above-average gains in flame retardant demand.

## Phosphorus compounds among best prospects

Alumina trihydrate was the largest volume flame retardant in use in 2006, accounting for one-third of world demand. However, the fastest growth among flame retardants will be seen in phosphorus compounds and other products -- including magnesium hydroxide -- which feature favorable environmental and health profiles. Despite these concerns, demand for brominated flame retardants will continue to rise at a

healthy pace due to their low price and superior performance.

Among flame retardant markets, construction applications will remain the leading outlet through 2011, comprising one-quarter of total demand. Advances will be fueled by the establishment of stricter fire codes throughout the world, especially in nonresidential buildings, and the increased use of plastic construction products. Flame retardants in electrical and electronics markets are expected to experience the most rapid gains in demand, however, due in part to shifts in the product mix toward non-halogenated compounds, which generally require higher additive loadings to be effective.

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**Sample Text,  
 Table & Chart**

**TABLE VI-11**  
**SOUTH KOREA -- FLAME RETARDANT DEMAND BY MARKET**  
 (thousand metric tons)

Item	1996	2001	2006	2011	2016
Flame Retardant Demand					
Construction					
Wire & Cable					
Electrical & Electronics					
Motor Vehicles					
Textiles					
Other					

**SAMPLE  
 TABLE**

**COMPANY PROFILES**

**Daihachi Chemical Industry Company**

Hiranomachi Yachiyo Building  
 8-13, Hiranomachi 1-chome  
 Chuo-ku, Osaka 541  
 Japan  
 816-6201-1455  
 http://www

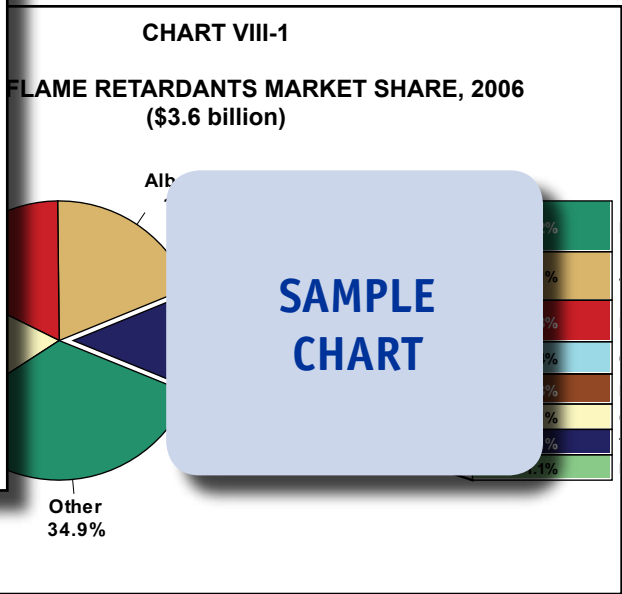
**SAMPLE  
 PROFILE**

Sales: \$ (Company)  
 Employe (Company)  
 Key Pro (ants)

Daihachi Chemical Industry Company sells products that include flame retardants, flame modifiers and metal extractants. The Company is privately held.

The Company is active in the world flame retardants industry through the manufacture of phosphoric acid-based flame retardants. Among these products are phosphoric acid esters and polyesters in halogen and halogen-free types intended to provide flame retardant properties in plastics. Daihachi Chemical Industry's flame retardants include TMP and TEP grades for rigid and flexible polyurethane foam, TCP and TXP for use in polyvinyl chloride, DAIGUARD-550 and DAIGUARD-660 for flexible foam and textiles end uses, and a range of grades for films and various other plastics applications. The Company also offers contract manufacturing capabilities for flame retardants and plasticizers.

Daihachi Chemical Industry has operations in the Asia/Pacific region. For example, in Japan, the Company has plants in Neyagawa,



## Sample Profile, Tables & Forecast

### MARKETS

#### South Korea: Products

Flame retardant demand in South Korea is forecast to grow 5.2 percent per year to 98,000 metric tons in 2011, valued at \$255 million. Electrical and electronics applications account for 38 percent of the total demand in 2006. South Korea is a major electronics manufacturing center, specializing in a wide range of products. For example, Samsung is a major producer of printed circuit boards (with a plant in South Korea) and a key consumer of brominated flame retardants. Other electronics manufactured in the country, including televisions, computers and appliances, all use flame retardant additives in their housings. Additions to electronics output in South Korea is expected to continue expanding at a strong pace, spurring further increases in flame retardant demand.

South Korea also has a significant automotive industry, and motor vehicles account for a sizable portion of flame retardant demand in the country. However, vehicle production is expected to decelerate through 2011, and as a result, motor vehicles will be the slowest growing outlet for flame retardants. Construction and textiles represent smaller portions of the flame retardant market. Awareness of fire safety issues has been on the rise in South Korea, especially in public buildings and transportation, in the wake of the Daegu subway fire in 2003 that killed nearly 200

**TABLE VI-10**  
**SOUTH KOREA -- FLAME RETARDANT DEMAND BY PRODUCT**  
 (thousand metric tons)

Item	1996	2001	2006	2011	2016
Flame Retardant Demand	44.0	53.7	76.0	98.0	124.0
Alumina Trihydrate					1.5
Brominated Compounds					2.7
Phosphorus Compounds					1.0
Chlorinated Compounds					0.4
Antimony Compounds					0.7
Boron Compounds					0.9
Other					0.8
\$/kg					2.5
Flame Retardant Demand (mil \$)					300.0

**SAMPLE  
 TEXT**

**SAMPLE  
 TABLE**

**TABLE VI-9**  
**SOUTH KOREA -- ECONOMIC INDICATORS**

Item	1996	2001	2006	2011	2016
Population (million)	45.6	47.5	48.5	49.2	49.6
GDP/capita	156	200	270	370	470
Gross Domestic Product (bil 2005\$)	7.1	9.5	13.1	18.3	23.1
Building Construct Expend (bil 2005\$)	1.2	1.5	2.0	2.7	3.5
Mfg Value Added (bil 2005\$)	3.9	5.0	6.7	9.0	11.6
Electric & Electronic Shpts (bil \$)	1.5	2.0	2.7	3.6	4.7
Motor Vehicle Production (000 units)	230	240	250	260	270
Plastics Production (mil metric ton)	1.0	1.2	1.5	1.8	2.2
kg flame retardant/capita	0.9	1.1	1.5	1.9	2.5
kg flame retardant/mil \$ GDP	6.0	5.2	4.0	3.2	2.5
Flame Retardant Demand (000 m ton)	44.0	53.7	76.0	98.0	124.0

**SAMPLE  
 TABLE**

“Consumption of flame retardants in South Korea totaled 76,000 metric tons in 2006, making it the fifth largest market worldwide. Flame retardant demand in South Korea is forecast to grow 5.2 percent per year to 98,000 metric tons in 2011, valued at \$255 million. The largest volume flame retardants used in South Korea are brominated compounds, which accounted for 38 percent of demand in 2006. However, demand for brominated flame retardants is expected to ...”  
 --Section VI, pg. 163-4

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**World Architectural Paints**

This study analyzes the global market for interior and exterior architectural paints, stains, undercoats, primers and sealers. It presents historical demand data (1996, 2001, 2006) and forecasts for 2011 and 2016 by formulation (water-based, solvent-based), market (residential building, nonresidential building), end user (professional, DIY/consumer), world region and for 23 major national markets. The study also considers market environment factors, evaluates company market share and profiles leading valve producers.

#2311 ..... 02/2008..... \$5600

**Wood Protection Coatings & Preservatives**

US demand for wood protection coatings and preservatives will grow 3.4% annually through 2011, driven in part by a shift toward higher value formulations. Interior applications such as flooring and cabinets will lead gains. Exterior uses will continue to suffer from wood's gradual market losses to lower-maintenance alternatives. This study analyzes the \$2.9 billion US wood protection industry, with forecasts for 2011 and 2016 by product, application and market. It also details market share and profiles major firms.

#2243 ..... 10/2007..... \$4500

**Pigments: Inorganic, Organic & Specialty**

US color pigment demand will grow 4.4% yearly through 2011, driven by a shift toward high-performance organic pigments and specialty types. Metallic, pearlescent and other specialty pigments will lead gains based on the need for more novel, eye-catching optical effects in automotive coatings, printing inks, plastics, cosmetics and toiletries. This study analyzes the \$3 billion US pigments industry, with forecasts for 2011 and 2016 by type and market. It also details market share and profiles major players.

#2232 ..... 08/2007..... \$4500

**Flame Retardants**

US demand for flame retardants will rise 3% annually through 2011, driven by increasingly stringent fire codes and flammability requirements, especially in building materials and consumer products. Phosphorus-based types will grow the fastest, while brominated compounds will continue to lead the market in total value. This study analyzes the \$827 million US flame retardant industry, with forecasts for 2011 and 2016 by type and market. It also evaluates company market share and profiles leading competitors.

#2217 ..... 08/2007..... \$4400

**Specialty Gases**

Specialty gas demand in the US will grow 5% annually through 2011. Best market opportunities are expected in electronics and manufacturing, as well as in a variety of new and/or lower volume uses such as home health care, propellants and packaging. Oxygen, noble gases and fluorine-based gases will lead gains by type. This study analyzes the \$2.8 billion US specialty gas industry, with forecasts for 2011 and 2016 presented by product and market. It also evaluates market share and profiles major players.

#2192 ..... 05/2007..... \$4400

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