Demand to rise more than 4% annually through 2012

US silicone demand is forecast to grow 4.2 percent per annum through 2012 to $3.9 billion, approximating the gains of the 2002-2007 period. In volume terms, demand is projected to rise 2.7 percent per annum, reaching 825 million pounds in 2012. Growth will be spurred by ongoing technological advancements and product innovation that will continue to improve the performance of silicone in a variety of markets and applications. Gains will also be aided by the rising use of silicone in numerous cosmetic and toiletry products, as well as expanding opportunities in medical applications. Increases will be somewhat limited, however, by a slowdown in durable goods production through 2012, as well as the relatively high cost of silicone.

Silicone fluids to register fastest product gains

Silicone fluids are expected to post the most rapid gains of all the major product segments through 2012. Advances will be buoyed by strong growth in cosmetic and toiletry production, as these fluids tend to improve the performance of products such as antiperspirants, deodorants, eye make-up, foundation, lipsticks and shampoos. Moderate growth is also expected in industrial and automotive applications, where silicone fluids can be used in greases, lubricants and polishes. Silicone resins are projected to expand at a healthy pace, benefiting from strong growth in construction expenditures through 2012, as well as a positive turnaround in motor vehicle production. Within a wide range of applications, silicone conditioning agents are expected to post the strongest increases, followed closely by emollients. Both will benefit from healthy gains in cosmetic and toiletry production through 2012, as well as continued advancements in silicone technology. Lubricant and grease applications are expected to rise at the slowest pace, hampered by a slowdown in the production of machinery and equipment.

Medical market to post strongest growth

Gains in the medical market are expected to exceed all other markets, due to silicone’s biocompatibility, low surface tension, chemical and thermal stability, and water-resistant qualities. The increased use of silicone gel-filled breast implants will also stimulate demand in the medical segment, following their reintroduction to the US market in late 2006. Construction markets will benefit from the rising use of higher performing silicone-based sealants/caulks and paints/coatings. Industrial markets are forecast to post below-average growth, primarily resulting from a slowdown in machinery and equipment production through 2012.

Study coverage

Silicones is a new Freedonia industry study priced at $4500. It presents historical demand data (1997, 2002, 2007) as well as forecasts for 2012 and 2017 by product, market, and application. The study also considers market environment factors, evaluates company market share and profiles 37 US industry competitors.
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Company Profiles
This study can help you:

• Determine your market & sales potential
• Learn more about industry competitors
• Assess new products & technologies
• Identify firms to merge with or acquire
• Complement your research & planning
• Gather data for presentations
• Confirm your own internal data
• Make better business decisions

Machinery and equipment is the leading market for silicone foams. Growth opportunities are expected in the transportation equipment segment in rail car, airline and mass transit seating due to the foam’s flame resistance, low smoke generation and toxic emissions, and light weight (a crucial attribute for aircraft applications). Other transportation equipment uses include insulation on railroads and marine craft. Typically, silicone foam is too expensive for conventional applications such as motor vehicle seat cushions. Nonetheless, silicone foam is occasionally used in automobiles and trucks in special circumstances, such as gasketing, where fuel, brake and other lines are in close proximity to the heat and may present a fire hazard.

Other markets for silicone foams include electronics and telecommunications. Silicone foams make excellent long term sealing materials for electrical communications enclosures, electronics, high intensity discharge lighting fixtures and appliances. They pass stringent Underwriters Laboratories’ flame ratings and are frequently chosen for insulation and dampening applications in communications enclosures, electronic products and industrial machinery.

Freedonia’s methods involve:

• Establishing consistent economic and market forecasts
• Using input/output ratios, flow charts and other economic methods to quantify data
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Other Titles from The Freedonia Group

Lubricants
This study analyzes the US lubricant industry. It presents historical demand data for the years 1997, 2002 and 2007 and forecasts for 2012 and 2017 by lubricant base oil, product (e.g., engine oils, process oils, hydraulic fluids, turbine oils, automatic transmission fluids, power steering fluids, metalworking fluids, gear oils, greases) and market. The study also considers market environment factors, details industry structure and competitive strategies, evaluates company market share and profiles industry players.

World Thermoplastic Elastomers
Global demand for thermoplastic elastomers (TPEs) will grow 6.3% annually through 2011, as they continue to replace natural and synthetic rubber, rigid thermoplastics and metal. China will gain market share but the US will remain the top producer of some products such as olefinic-based TPEs. This study analyzes the $10.4 billion world TPE industry, with forecasts for 2011 and 2016 by type, market, world region and for 16 countries. It also evaluates company market share and profiles major producers.

Metalloocene & Single-Site Polymers
US metallocene and single-site polymer demand will grow 17.7% annually through 2011. mLLDPE will remain dominant while mHDPE and polypropylene will lead gains. Film and sheet will remain the most common application, but will be outpaced by injection and blow molding uses. This study analyzes the $2.4 billion US metallocene and single-site polymer industry, with forecasts for 2011 and 2016 by polymer, application and market. It also evaluates company market share and profiles leading competitors.

Fluoropolymers
US fluoropolymer demand will rise 5.7% per year through 2011. PVDFs lead gains among major uses based on strength in architectural coatings. Fluoroelastomers will also do well, benefiting from improved motor vehicle and aerospace markets. Electrical and electronic products will be the fastest growing market. This study analyzes the $1.4 billion US fluoropolymer industry, with forecasts for 2011 and 2016 by product, application and market. It also details market share and profiles major firms.

Natural Polymers
US natural polymer demand will grow 5.9% annually through 2010 based on increased food production and opportunities in packaging and medical uses. Starch and fermentation products will grow the fastest and surpass cellulose ethers as the dominant type by 2015. The food and beverage market will remain dominant while medical uses will lead gains. The study analyzes the $2.7 billion US natural polymer industry for 2010 and 2015 by product and market. It also details market share and profiles major players.

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