



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)

World Dyes & Organic Pigments

Industry Study with Forecasts for **2013 & 2018**

Study #2508 | May 2009 | \$5800 | 398 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	4
Recent Historical Trends	5
Macroeconomic Outlook	7
World Demographic Outlook	10
World Manufacturing Overview	12
World Mill Fiber Consumption	14
Manufactured Fibers	17
Natural Fibers	19
World Printing Ink Industry Overview	21
World Plastic Industry Overview	23
World Paint & Coatings Industry Overview	26
Environmental & Regulatory Issues	28
Environmental Concerns	29
Consumer & Worker Safety Concerns	30
World Trade Overview	32
Per Capita Dye & Pigment Demand	35
Dye & Organic Pigment Technology	38
Textiles	39
Printing Inks	41
Paint & Coatings	43
Plastics	45

WORLD DYE & ORGANIC PIGMENT OVERVIEW

General	47
Demand by Region	48
Demand by Product	50
Dyes	51
Disperse Dyes	54
Reactive Dyes	56
Acid Dyes	58
Direct Dyes	60
Basic Dyes	62
Other Dyes	64
Organic Pigments	67
Azo Pigments	71
Phthalocyanine Pigments	75
Other Organic Pigments	78
Demand by Market	83
Textiles	85
Printing Inks	90
Plastics	93
Paint & Coatings	96
Other Markets	99

NORTH AMERICA

General	104
Macroeconomic Indicators	105
Dye & Organic Pigment Demand	107
United States	109
Canada	116
Mexico	122

WESTERN EUROPE

General	129
Macroeconomic Indicators	130
Dye & Organic Pigment Demand	132
Belgium	135
France	140
Germany	146
Italy	152
Netherlands	158
Spain	164
United Kingdom	169
Other Western Europe	175

ASIA/PACIFIC

General	182
Macroeconomic Indicators	184
Dye & Organic Pigment Demand	186
China	189
India	197
Indonesia	204
Japan	210
South Korea	216
Taiwan	222
Thailand	228
Other Asia/Pacific	233

OTHER REGIONS

Latin America	242
Brazil	247
Other Latin America	253
Eastern Europe	259
Russia	264
Other Eastern Europe	271
Africa/Mideast	277
Turkey	283
Other Africa/Mideast	289

INDUSTRY STRUCTURE

General	296
Market Share	300
Acquisitions & Divestitures	303
Cooperative Agreements	306
Research & Development	308
Competitive Strategies	310

COMPANY PROFILES

Apollo Colors	313
Atul Limited	314
BASF SE	315
China Tianjin Tianshun Chemical Dyestuff	322
CHT R. Beitlich	323
Clariant International	324
Dainichiseika Color & Chemicals	332
Dankong Industry and Trade Group	334
DIC Corporation	335
Dow Chemical	338
DyStar Textilfarben	340
Eksoy Chemical	343
Emerald Performance Materials	344
European Colour	346
Everlight Chemical	347
Flint Group	348
Hangzhou Dikai Chemical	349
Heubach GmbH	350
Huntsman Corporation	352
Jihua Group	355
Kyung-In Synthetic	356
Lamberti SpA	358
LANXESS AG	360
Merck KgaA	363
Nagase & Company	366
Nippon Kayaku	367
Pigmentos y Oxidos	368
RPM International	370
Saraf Group	372
Sensient Technologies	373
Shanghai Road Dyestuffs & Chemicals	377
Sudarshan Chemical	378
Sumitomo Chemical	380
Synthesia as	382
Thomas Swan	383
Toyo Ink	385
Vilmax SA	387
Yorkshire Group	388
Zhejiang Longsheng Group	390
Additional Companies Mentioned in the Study	392

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region ..10
 2 World Population by Region12
 3 World Manufacturing Value Added13
 4 World Mill Fiber Consumption16
 5 World Printing Ink Production23
 6 World Plastic Production.....25
 7 World Paint & Coatings Production28
 Cht Per Capita Dye & Organic Pigment Demand/Per Capita GDP Relationship, 2008.....37

WORLD DYE & ORGANIC PIGMENT OVERVIEW

1 World Dye & Organic Pigment Demand by Region49
 Cht World Dye & Inorganic Pigment Demand by Region, 200850
 2 World Dye & Organic Pigment Demand by Type51
 3 World Dye Demand by Type53
 Cht World Dye Demand by Type, 2008.....53
 4 World Disperse Dye Demand56
 5 World Reactive Dye Demand58
 6 World Acid Dye Demand.....60
 7 World Direct Dye Demand62
 8 World Basic Dye Demand64
 9 World Demand for Other Dyes67
 10 World Organic Pigment Demand by Type...70
 Cht World Organic Pigment Demand by Type, 2008.....71
 11 World Azo Pigment Demand75
 12 World Phthalocyanine Pigment Demand ...78
 13 World Demand for Other Organic Pigments.....83
 14 World Dye & Organic Pigment Demand by Market84
 Cht World Dye & Organic Pigment Demand by Market, 2008.....85
 15 World Textile Market for Dyes & Organic Pigments.....90
 16 World Printing Ink Market for Dyes & Organic Pigments93
 17 World Plastic Market for Dyes & Organic Pigments.....96
 18 World Paint & Coatings Market for Dyes & Organic Pigments99
 19 Other Markets for Dyes & Organic Pigments..... 103

NORTH AMERICA

1 North America: Macroeconomic Indicators..... 106
 2 North America: Dye & Organic Pigment Demand..... 108
 3 United States: Macroeconomic Indicators..... 112
 4 United States: Dye & Organic Pigment Demand..... 115
 5 Canada: Macroeconomic Indicators..... 119
 6 Canada: Dye & Organic Pigment Demand 121
 7 Mexico: Macroeconomic Indicators 125
 8 Mexico: Dye & Organic Pigment Demand 127

WESTERN EUROPE

1 Western Europe: Macroeconomic Indicators..... 132
 2 Western Europe: Dye & Organic Pigment Demand..... 134
 Cht Western Europe: Dye & Organic Pigment Demand by Country, 2008..... 135
 3 Belgium: Macroeconomic Indicators 138
 4 Belgium: Dye & Organic Pigment Demand..... 139
 5 France: Macroeconomic Indicators..... 143
 6 France: Dye & Organic Pigment Demand . 145
 7 Germany: Macroeconomic Indicators..... 149
 8 Germany: Dye & Organic Pigment Demand..... 151
 9 Italy: Macroeconomic Indicators 155
 10 Italy: Dye & Organic Pigment Demand ... 157
 11 Netherlands: Macroeconomic Indicators . 161
 12 Netherlands: Dye & Organic Pigment Demand..... 163
 13 Spain: Macroeconomic Indicators..... 166
 14 Spain: Dye & Organic Pigment Demand .. 168
 15 United Kingdom: Macroeconomic Indicators..... 172
 16 United Kingdom: Dye & Organic Pigment Demand..... 174
 17 Other Western Europe: Macroeconomic Indicators..... 178
 18 Other Western Europe: Dye & Organic Pigment Demand 180

ASIA/PACIFIC

1 Asia/Pacific: Macroeconomic Indicators . 186
 2 Asia/Pacific: Dye & Organic Pigment Demand..... 188
 Cht Asia/Pacific: Dye & Organic Pigment Demand by Country, 2008..... 189
 3 China: Macroeconomic Indicators..... 193
 4 China: Dye & Organic Pigment Demand .. 195
 5 India: Macroeconomic Indicators 200
 6 India: Dye & Organic Pigment Demand... 202
 7 Indonesia: Macroeconomic Indicators 207

8 Indonesia: Dye & Organic Pigment Demand..... 209
 9 Japan: Macroeconomic Indicators 213
 10 Japan: Dye & Organic Pigment Demand.. 215
 11 South Korea: Macroeconomic Indicators . 219
 12 South Korea: Dye & Organic Pigment Demand..... 221
 13 Taiwan: Macroeconomic Indicators 225
 14 Taiwan: Dye & Organic Pigment Demand 227
 15 Thailand: Macroeconomic Indicators..... 230
 16 Thailand: Dye & Organic Pigment Demand..... 232
 17 Other Asia/Pacific: Macroeconomic Indicators..... 237
 18 Other Asia/Pacific: Dye & Organic Pigment Demand..... 240

OTHER REGIONS

1 Latin America: Macroeconomic Indicators..... 245
 2 Latin America: Dye & Organic Pigment Demand..... 247
 3 Brazil: Macroeconomic Indicators..... 250
 4 Brazil: Dye & Organic Pigment Demand .. 252
 5 Other Latin America: Macroeconomic Indicators..... 256
 6 Other Latin America: Dye & Organic Pigment Demand..... 258
 7 Eastern Europe: Macroeconomic Indicators..... 262
 8 Eastern Europe: Dye & Organic Pigment Demand..... 264
 9 Russia: Macroeconomic Indicators..... 268
 10 Russia: Dye & Organic Pigment Demand . 270
 11 Other Eastern Europe: Macroeconomic Indicators..... 274
 12 Other Eastern Europe: Dye & Organic Pigment Demand..... 276
 13 Africa/Mideast: Macroeconomic Indicators..... 281
 14 Africa/Mideast: Dye & Organic Pigment Demand..... 283
 15 Turkey: Macroeconomic Indicators..... 286
 16 Turkey: Dye & Organic Pigment Demand . 288
 17 Other Africa/Mideast: Macroeconomic Indicators..... 292
 18 Other Africa/Mideast: Dye & Organic Pigment Demand..... 294

INDUSTRY STRUCTURE

1 World Dye & Organic Pigment Sales by Company, 2008..... 297
 Cht World Dye & Organic Pigment Market Share, 2008 303
 2 Selected Acquisitions & Divestitures..... 305
 3 Selected Cooperative Agreements..... 307

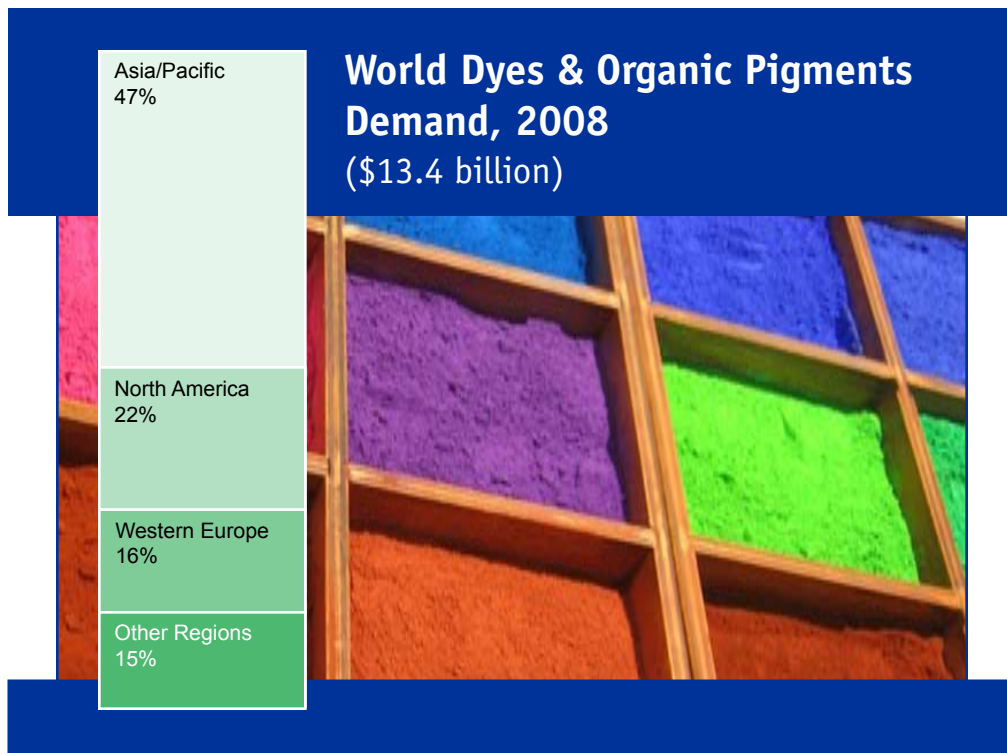
Market value will benefit from consumer preferences for environmentally friendly products, which will support consumption of high-performance dyes and organic pigments.

Global demand to grow 3.9% yearly through 2013

World demand for dyes and organic pigments is forecast to increase 3.9 percent per year through 2013, in line with real (inflation-adjusted) gains in manufacturing activity. Volume demand will grow 3.5 percent annually. While the textile industry will remain the largest consumer of dyes and organic pigments, faster growth is expected in other markets such as printing inks, paint and coatings, and plastics. Market value will benefit from consumer preferences for environmentally friendly products, which will support consumption of high-performance dyes and organic pigments.

Asia/Pacific region to remain fastest growing

Following trends seen over the past decade, the Asia/Pacific region will experience the strongest growth and increase its share of the global dye and organic pigment market. China is by far the largest single consumer in the world and the fastest growing national market. India will also post rapid increases, but demand levels will remain well below those of China. China alone is expected to account for about two-fifths of global value gains in dye and organic pigment demand between 2008 and 2013. Strong gains will also occur in other developing areas such as the Africa/Mideast region and Eastern Europe, while market maturity will limit advances in developed areas such as North America, Western Europe and Japan.



Organic pigment demand to outpace dye consumption

Growth in dye consumption will trail increases in organic pigment demand, although dyes will continue to represent the lion's share of the overall market both in volume and value. Among the different dye product types, disperse dyes are expected to see the most rapid gains, due to their usage in the fast-growing polyester fiber industry. For their part, organic pigments find increasing use in inks and coatings due to their ability to provide intense and bright colors. However, drawbacks to the use of organic pigments include their generally higher price points than those of inorganics and their only moderate ability

to provide opacity. The best prospects are for high-performance products such as quinacridones, which will experience favorable gains as end users require more exacting properties from their coloring agents.

While specialized pigment grades will offer good opportunities due to their enhanced environmental acceptability and superior performance characteristics, classical or conventional grades are expected to continue to dominate the organic market. These relatively lower-priced commodity organic pigments will remain widely employed in large-volume markets with less exacting performance standards for colorants, such as printing inks.

Copyright 2009 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

ASIA/PACIFIC

China: Dye & Organic Pigment Demand

China is the largest organic colorant producing and consumption in the Asia/Pacific region. China has substantially expanded its colorant capabilities over the last several decades, in response to growth in both domestic and export demand for plastics, coatings, inks, as well as for dyes and pigments. Overall, China accounts for 22 percent of regional demand and 22 percent of all world demand.

Demand for dyes and organic pigments in China is forecast to expand at a rate of 10 percent per year through 2013. In volume terms, consumption is expected to grow at a rate of 10 percent per year to 1.5 million metric tons by 2013. The market for dyes and organic pigments in China is largely plastic, which is comparatively underdeveloped. The market is most interested in error correction, the production and higher-quality products. Although growth in organic pigments remains in other geographic markets, advances will decelerate from the double-digit annual rate of increase seen over the last decade.

The increasing market value for dyes will result from continued growth in China's textile industry as well as an increasing emphasis on higher-value dyes. Gains will be relatively healthy for reactive dyes, despite slowing use of cotton fibers, as these products take a greater share of the country's cotton dyeing market. China is the world's largest cotton consumer, and its cotton processing sector represents a major market for both sulfur and reactive dyes. In addition, the country's growing polyester fiber industry is a major consumer of disperse dyes.

While domestic demand has been growing rapidly, the dye and organic pigment industry in China remains geared toward serving export markets to a significant degree -- mostly Asia, but also Western Europe and North America. China is a leading manufacturer of dyes and organic

**SAMPLE
TEXT**

TABLE VI-3

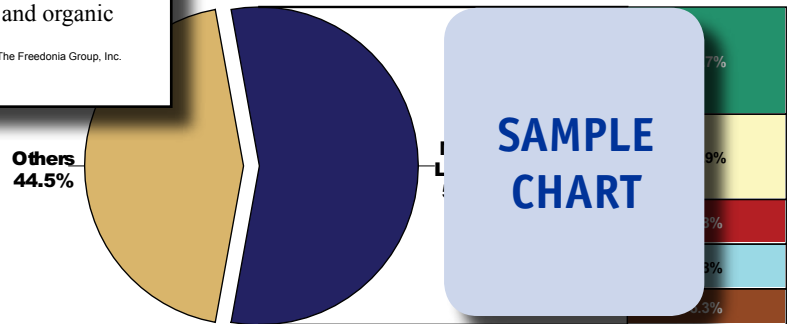
CHINA -- MACROECONOMIC INDICATORS

Item	1998	2003	2008	2013	2018
Population (mil persons)					1,398
\$ GDP/capita					1,000
Gross Domestic Product (bil 2007\$)					10,000
% manufacturing					19
Manufacturing Value Added (bil 2007\$)					10,000
Mill Fiber Consumption (000 m tons)					10,000
Printing Ink Production (000 m tons)					10,000
Plastic Production (000 m tons)					10,000
Paint & Coatings Prdn (000 m tons)					10,000
\$ dyes & pigments/capita					15
\$ dyes & pigments/000\$ MVA					15
Dye & Organic Pigment Demand (mil \$)					60

**SAMPLE
TABLE**

CHART VIII-1

DYE & ORGANIC PIGMENT MARKET SHARE, 2008 (\$13.4 billion)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Eksoy Chemical Industries Limited
 Yildiz Posta Cad. Akin Sitesi No:8 D:32
 Gayrettepe, Istanbul
 Turkey
 90-282-726-7
<http://www.eksoy.com>

Annual Sales:
 Employment:
 Key Products:

**SAMPLE
PROFILE**

Eksoy Chemicals, including surfactants, detergents, other auxiliaries and textile dyes. In addition to Turkey, the privately held company's textile chemicals are distributed primarily elsewhere in the Middle East and in Eastern Europe. Among Eksoy Chemical's specific export markets are Syria, Iran, Poland and Greece, as well as Egypt and the US.

The Company is active in the world dye and pigment industry through the manufacture and sale of reactive and disperse textile dyes. Eksoy Chemical's reactive dyes include high lightfastness types; dark dyes, which exhibit high fixing and brightness properties, making them suitable for use in mixing dark colors; light color dyes, which feature high lightfastness; conventional dyes for making medium and dark colors; and specialty black dyes. The Company's portfolio of disperse dyes comprises conventional types suitable for high-temperature, Thermosol and other types of dyeing processes; low-molecular-weight light shade types used in high-temperature dyeing and carrier dyeing; rapid dyes, which feature high diffusion and can be used at low temperatures; fluorescent dyes; and black dyes. Furthermore, Eksoy Chemical also makes such dye auxiliaries as OPTIK ULTRA optical brighteners, COLORFIX dye fixation agents and EXOLINE soaping agents.

TABLE VI-4

CHINA: DYE & ORGANIC PIGMENT DEMAND
 (million dollars)

Item	1998	2003	2008	2013	2018
Dye & Organic Pigment Demand	10	15	20	25	30
By Type:					
Dyes					10
Organic Pigments					50
By Market:					
Textiles					80
Printing Inks					40
Plastics					70
Paint & Coatings					10
Other Markets					60
\$/kilogram					39
Dyes & Organic Pigments (000 m tons)					32
% China					2.4
Asia/Pacific Dyes/Org Pigments (mil \$)	3400	4500	5500	6500	7620

**SAMPLE
TABLE**

"China will remain a large exporter of dyes (especially low-cost commodity types) to most of the world's textile industries, including Germany, India, Indonesia, Japan, South Korea, Turkey, the US and many others worldwide. Over the coming years, it is expected that China will become an increasingly important producer of higher-value dyes and organic pigment as well."

--Section VI, pg. 195

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2300, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2508

World Dyes & Organic Pigments..... \$5800

Corporate Use License (add to study price) * + \$2300

Additional Print Copies @ \$500 each *

Total (including selected option) \$

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card #

Expiration MM YY

Signature

Name

Title

Company

Division

Street (No PO Box please)

City/State/Zip

Country

Phone Fax

Email

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2300; one additional user, add \$500; two additional users, add \$1000; three additional users, add \$1500.

Signature

OTHER STUDIES

Powder Coatings

This study analyzes the US powder coatings industry. It presents historical demand data for 1998, 2003 and 2008, and forecasts for 2013 and 2018 by product (e.g., epoxies, epoxy/polyester hybrids, polyesters, polyurethanes, acrylic, silicone, polyvinyl chloride, nylon, ethylene acrylic acid copolymer, fluoropolymer, polyethylene, polypropylene) and end use market. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry competitors.

#2518 06/2009..... \$4700

Wood Protection Coatings & Preservatives

This study analyzes the US wood protection industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (e.g., stains, paints, sealers, primers, metallic compounds, nonmetallic compounds), application (e.g., siding, decking, furniture, windows and doors, flooring, fencing, cabinets) and market (e.g., building construction, nonbuilding construction). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2509 06/2009..... \$4800

Printing Inks

US printing ink demand will reach \$4.8 billion in 2013, supported by shifts toward more environmentally friendly ink formulations and digital inks. Among raw materials, additives and colorants will benefit from demand for better performing printing inks with brighter colors. Packaging will remain the largest and fastest-growing market. This study analyzes the US printing ink industry, with forecasts for 2013 and 2018 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2462 02/2009..... \$4700

World Textile Chemicals

Global demand for textile chemicals will reach \$19 billion in 2012. Colorants and auxiliaries will remain the biggest product segment, while faster gains will be seen in finishing chemicals. The Asia/Pacific region, particularly China and India, will remain the largest consumer of textile chemicals, and is also forecast to grow the fastest. This study analyzes the \$16.6 billion world textile chemical industry, with forecasts for 2012 and 2017 by type, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2426 12/2008..... \$5700

Paint & Coatings

US demand for paint and coatings will rise 3.1% annually through 2012, aided by an improving outlook for construction and manufacturing activity and favorable export opportunities. A rebounding residential market will pace the dominant architectural paint segment, with interior paint outpacing exterior. This study analyzes the \$19.7 billion US paint and coating industry, with forecasts for 2012 and 2017 by market, application, end use and formulation. It also evaluates company market share and profiles industry players.

#2386 08/2008..... \$4600

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)