



[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 Salt

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

Study #2597 | March 2010 | \$5700 | 262 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
World Economic Outlook.....	7
World Demographic Overview	11
GDP Per Capita	12
Manufacturing Outlook.....	14
Chemical Manufacturing Outlook.....	16
Food Manufacturing Outlook	18
World Paved Roads	21
Climatic Factors	23
World Livestock	24
Environmental & Regulatory Overview	25
Pricing Trends	27

OVERVIEW

General	31
Demand by Region	32
Relationship of Per Capita Income & Salt Demand	33
Demand by Market.....	37
Chemical Manufacturing	38
Road Deicing.....	42
Food Processing.....	45
Livestock.....	48
Other Markets.....	50
World Salt Shipments by Region	53
World Salt Shipments by Production Method	56
Solar Evaporation.....	58
Rock Salt.....	60
Brine	60
Vacuum Pan & Other.....	62
International Trade	62

NORTH AMERICA

North America: General	66
North America: Supply & Demand	67
North America: Demand by Market	69
United States	70
Canada	75
Mexico	79

WESTERN EUROPE

Western Europe: General.....	84
------------------------------	----

Western Europe: Supply & Demand.....	85
Western Europe: Demand by Market.....	87
Germany	89
France.....	93
United Kingdom.....	96
Spain	100
Italy	103
Netherlands	107
Other Western Europe	111

ASIA/PACIFIC

Asia/Pacific: General.....	116
Asia/Pacific: Supply & Demand.....	118
Asia/Pacific: Demand by Market.....	120
China	121
India	126
Japan.....	130
South Korea	134
Australia.....	138
Other Asia/Pacific	142

OTHER REGIONS

Latin America.....	147
Supply & Demand.....	148
Demand by Market.....	150
Brazil.....	152
Chile.....	155
Other Latin America	158
Eastern Europe	162
Supply & Demand.....	163
Demand by Market.....	165
Russia	166
Poland	170
Ukraine	173
Other Eastern Europe.....	176
Africa/Mideast.....	179
Supply & Demand.....	181
Demand by Market.....	182
Turkey	183
Other Africa/Mideast	186

INDUSTRY STRUCTURE

General	191
Market Composition.....	191
Market Share	194
Distribution	197
Marketing	199
Mergers & Acquisitions.....	200
Cooperative Agreements.....	201

COMPANY PROFILES

Akzo Nobel	205
Atisale SpA	208
British Salt	209
Cargill Incorporated	211
China National Salt	214
Compagnie des Salins du Midi et des Salines de l'Est.....	215
Compass Minerals International.....	217
Dev Salt	220
Dow Chemical.....	221
Exportadora de Sal	222
Henrique Lage Salineira do Nordeste	224
INEOS Group	225
Irish Salt Mining & Exploration	226
Italkali Societa Italiana Sali Alcalini	227
K+S AG.....	229
Kopalnia Soli Klodawa Spolka Akcyjna	235
Mitsui & Company	236
OAQ Sil'vinit.....	238
Pakistan Mineral Development.....	239
Proasal Salinera de Andalucia.....	240
Ridley Corporation	241
Rio Tinto	244
Russalt Limited.....	246
Salina Salt	247
Salinen Austria	248
Solana Tuzla.....	250
Solvay SA	251
State Enterprise Association Artyomsol.....	252
Suedwestdeutsche Salzwerke.....	253
United Salt	256
Wacker-Chemie AG.....	258
Additional Companies Mentioned in the Study.....	260

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table	3
-----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region	10
2 World Population by Region.....	12
3 World Per Capita GDP by Region	14
4 World Manufacturing Value Added	16

(continued on following page)

List of Tables/Charts

(continued from previous page)

5 World Chemical Manufacturing Value Added.....	18
6 World Food & Beverage Manufacturing Value Added.....	21
7 World Paved Roads.....	22
8 World Livestock Population.....	25
9 Average Salt Prices by Region & Market.....	29
Cht Salt Price Changes by Market, 1998-2018.....	30

OVERVIEW

1 World Salt Demand by Region.....	33
Cht Gross Domestic Product Per Capita & Salt Demand Per Capita Relationship, 2008.....	36
2 World Salt Demand by Market.....	37
Cht World Salt Demand by Market, 2008..	38
3 Chemical Manufacturing Market for Salt by Region.....	41
Cht Chemical Manufacturing Market for Salt by Region, 2008.....	42
4 Road Deicing Market for Salt by Region.....	44
5 Food Processing Market for Salt by Region.....	48
6 Livestock Market for Salt by Region..	50
7 Other Markets for Salt by Region.....	53
8 Salt Shipments by Region.....	55
Cht Salt Shipments by Region, 1998-2018.....	56
9 Salt Shipments by Production Method	57
Cht Salt Shipments by Production Method, 2008.....	58
10 Salt Net Exports by Region.....	64
Cht International Trade in Salt by Country, 2008.....	65

NORTH AMERICA

1 North America -- Salt Supply & Demand.....	68
2 North America -- Salt Demand by Market.....	70
3 United States -- Salt Supply & Demand.....	73
4 United States -- Salt Demand by Market.....	75

5 Canada -- Salt Supply & Demand.....	77
6 Canada -- Salt Demand by Market.....	79
7 Mexico -- Salt Supply & Demand.....	82
8 Mexico -- Salt Demand by Market.....	83

WESTERN EUROPE

1 Western Europe -- Salt Supply & Demand.....	87
2 Western Europe -- Salt Demand by Market.....	89
3 Germany -- Salt Supply & Demand....	91
4 Germany -- Salt Demand by Market...	92
5 France -- Salt Supply & Demand.....	95
6 France -- Salt Demand by Market.....	96
7 United Kingdom -- Salt Supply & Demand.....	98
8 United Kingdom -- Salt Demand by Market.....	99
9 Spain -- Salt Supply & Demand.....	102
10 Spain -- Salt Demand by Market.....	103
11 Italy -- Salt Supply & Demand.....	106
12 Italy -- Salt Demand by Market.....	107
13 Netherlands -- Salt Supply & Demand.....	109
14 Netherlands -- Salt Demand by Market.....	110
15 Other Western Europe -- Salt Supply & Demand.....	113
16 Other Western Europe -- Salt Demand by Market.....	114
17 Other Western Europe -- Salt Demand by Country.....	115

ASIA/PACIFIC

1 Asia/Pacific -- Salt Supply & Demand.....	119
2 Asia/Pacific -- Salt Demand by Market.....	121
3 China -- Salt Supply & Demand.....	124
4 China -- Salt Demand by Market.....	126
5 India -- Salt Supply & Demand.....	129
6 India -- Salt Demand by Market.....	130
7 Japan -- Salt Supply & Demand.....	133
8 Japan -- Salt Demand by Market.....	134
9 South Korea -- Salt Supply & Demand.....	137
10 South Korea -- Salt Demand by Market.....	138
11 Australia -- Salt Supply & Demand..	140
12 Australia -- Salt Demand by Market..	142

13 Other Asia/Pacific -- Salt Supply & Demand.....	145
14 Other Asia/Pacific -- Salt Demand by Market.....	146

OTHER REGIONS

1 Latin America -- Salt Supply & Demand.....	150
2 Latin America -- Salt Demand by Market.....	151
3 Brazil -- Salt Supply & Demand.....	154
4 Brazil -- Salt Demand by Market.....	155
5 Chile -- Salt Supply & Demand.....	157
6 Chile -- Salt Demand by Market.....	158
7 Other Latin America -- Salt Supply & Demand.....	161
8 Other Latin America -- Salt Demand by Market.....	162
9 Eastern Europe -- Salt Supply & Demand.....	164
10 Eastern Europe -- Salt Demand by Market.....	166
11 Russia -- Salt Supply & Demand.....	169
12 Russia -- Salt Demand by Market....	170
13 Poland -- Salt Supply & Demand.....	172
14 Poland -- Salt Demand by Market....	173
15 Ukraine -- Salt Supply & Demand....	175
16 Ukraine -- Salt Demand by Market...	176
17 Other Eastern Europe -- Salt Supply & Demand.....	178
18 Other Eastern Europe -- Salt Demand by Market.....	179
19 Africa/Mideast -- Salt Supply & Demand.....	182
20 Africa/Mideast -- Salt Demand by Market.....	183
21 Turkey -- Salt Supply & Demand.....	185
22 Turkey -- Salt Demand by Market.....	186
23 Other Africa/Mideast -- Salt Supply & Demand.....	189
24 Other Africa/Mideast -- Salt Demand by Market.....	190

INDUSTRY STRUCTURE

1 Value of Salt Production for Selected Companies, 2008.....	194
Cht World Salt Market Share by Company, 2008.....	195
2 Selected Cooperative Agreements ...	203

The large chemical manufacturing market will generate the majority of additional demand between 2008 and 2013 due to strong expansion of chemical manufacturing activity in China.

Global demand to rise 2.6% yearly through 2013

Global demand for salt is forecast to rise 2.6 percent per year to 301.5 million metric tons in 2013. Growth of salt demand in developing countries will more than offset the expected contraction of demand in the developed economies of North America, Western Europe and Japan. The large chemical manufacturing market will generate the majority of additional demand between 2008 and 2013 due to strong expansion of chemical manufacturing activity in China.

China, India to be among fastest growing markets

China was the largest consumer of salt in 2008, mostly due to its sizable chemical industry, but also because of the dietary needs of its 1.3 billion residents. China accounted for nearly one-quarter of global salt demand in 2008, and is projected to continue to be the fastest growing major national market, driven by robust expansion of its economy. Because China's domestic salt production is not expected to keep up with demand, China is also forecast to be the fastest growing salt importer. Demand for salt in India is also forecast to grow at an above-average pace through 2013, as continuing industrialization increases its use of salt in chemical manufacturing and other industries. Shipments of salt from India will grow even faster, as India increasingly exports its salt.

World Salt Demand, 2013 (302 million metric tons)



Chemical manufacturing market to grow faster than average

Chemical manufacturing is the largest market for salt, accounting for more than 50 percent of demand in 2008. Most demand in this market is generated by chloralkali and synthetic soda ash producers, which use salt as their primary raw material. Nearly half of the salt consumed by the chemical manufacturing market is concentrated in the Asia/Pacific region, which accounts for the largest share of global chemical manufacturing activity. Globally, this market for salt is forecast to expand faster than average between 2008 and 2013.

Solar evaporation to claim bigger share of production

Solar evaporation is the most popular method of producing salt, owing to its widespread use in Latin America and the Africa/Mideast and Asia/Pacific regions. In areas with a favorable climate, this is the most economical method of producing salt. Because salt production is forecast to grow fastest in these regions, solar evaporation is projected to account for an increasing share of global salt production through 2013. In 2008, rock salt and brine accounted for the largest share of salt production in North America and Western Europe, respectively.

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

ASIA/PACIFIC

China: Demand by Market

The largest market for salt in China is chemical manufacturing which accounted for three-quarters of demand in 2008. This grew at a double-digit annual pace between 1998 and 2008, the rapid growth of chemical manufacturing activity. By 2008, China had become the world's leading chemical manufacturer, producing more chemical products than either North America or Western Europe. Specifically, China is the world's leading producer of chlorine and synthetic soda ash. The chemical manufacturing market for salt is forecast to expand through 2013, growing nine percent per year to 2.6 billion metric tons.

The food processing industry is the second largest market for salt in China. As the most populous nation, China's consumes sizable quantities of salt in its population's dietary needs. Growth in the food processing market for salt is largely being driven by the country's rapidly growing food processing industry, which is benefiting from increasing domestic demand. Through 2013, demand for salt in the food processing market is forecast to rise 3.2 percent per year to 1.2 billion metric tons.

The other markets in China are forecast to grow faster through 2013, helped by strong expansion of manufacturing as the country's economy continues to grow. The road deicing market in China is small, owing to the relatively mild winter conditions experienced in most of its populated areas. However, road deicing is expected to increase as government spending on transportation safety increases. In value terms, the Chinese market for salt is forecast to grow 3.2 percent per year to \$2.6 billion in 2013.

The other markets in China are forecast to grow faster through 2013, helped by strong expansion of manufacturing as the country's economy continues to grow. The road deicing market in China is small, owing to the relatively mild winter conditions experienced in most of its populated areas. However, road deicing is expected to increase as government spending on transportation safety increases. In value terms, the Chinese market for salt is forecast to grow 3.2 percent per year to \$2.6 billion in 2013.

125

Copyright 2010

TABLE VI-4

CHINA -- SALT DEMAND BY MARKET
(million metric tons)

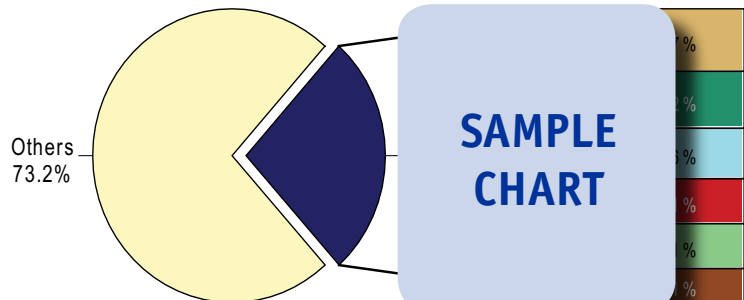
Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2007\$)	30	35	40	45	50
metric tons salt/mil \$ GDP	0.0001	0.0001	0.0001	0.0001	0.0001
Salt Demand	2	3	4	5	6
Chemical Manufacturing	1	2	3	4	5
Road Deicing	0.1	0.1	0.1	0.1	0.1
Food Processing	0.5	0.6	0.7	0.8	0.9
Livestock	0.1	0.1	0.1	0.1	0.1
Other	0.2	0.2	0.2	0.2	0.2
\$/metric ton	5	5	5	5	5
Salt Demand (mil \$)	10	15	20	25	30

SAMPLE
TABLE

SAMPLE
TEXT

CHART VIII-1

WORLD SALT MARKET SHARE BY COMPANY
(\$9.7 billion, 2008)

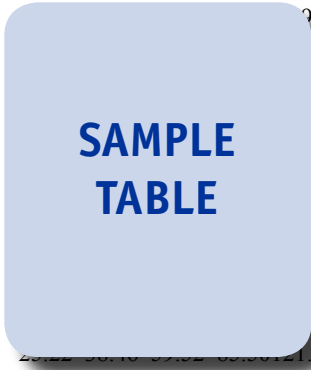


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-3
CHINA -- SALT SUPPLY & DEMAND

Item	1998	2003	2008	2013	2018
Gross Domestic Product (bil 2007\$)					940
\$ GDP/capita					30
Population (mil persons)					1,07
metric tons salt/mil \$ GDP					90
metric tons salt/000 persons					90
Salt Demand (mil metric tons)					80
- imports					40
+ exports					30
Salt Shipments (mil metric tons)					11.90



COMPANY PROFILES

Italkali Societa Italiana Sali Alcalini SpA
 Via P.pe Granatelli 46
 Palermo, Sicily 90139
 Italy
 39-91-602-911
 http://www.ita
 Annual Sales:
 Employment:

SAMPLE PROFILE

Key Products:

Italkali Societa Italiana Sali Alcalini SpA is the largest producer of rock salt in Italy. The p... vacuum salt.

The Company's products include rock salt, sea salt and vacuum salt for human consumption, water-softening, industrial and animal feed applications. For human consumption, Italkali makes table salts under such brand names as SALE DI SICILIA, IPOSAL, ARMONIA DI SALE, FIOR DI SALE MARINO, SALE MARE ANTICO and SALORO. Some of these salts contain low levels of sodium and are enriched with potassium iodate. In addition to table salts, Italkali makes salt for the food processing industry. The Company's water-softening salts comprise products sold under the DEPUREL, CRISTALLI DI SALGEMA and MAGIKAL brand names. For example, DEPUREL slow time-released recrystallized salt tablets feature a high sodium chloride content. Products for the industrial sector include TINTOREL vacuum salt for dyeing applications, as well as rock salt for use in the dyeing and tannery markets. Italkali serves the animal feed industry through the production of livestock salt supplied in 25-, 50-, and 1,400-kilogram bags.

Italkali mines and processes rock salt at sites in Petralia, Racalmuto and Realmonte, Sicily. On a yearly basis Italkali has the capacity to produce

227 Copyright 2010 The Freedonia Group, Inc.

"Between 1998 and 2008, demand for salt in China grew more than nine percent per annum, benefiting from the country's rapid economic expansion. Through 2013, growth of salt demand is expected to slow somewhat, but China will remain the fastest growing of the world's major national markets as demand for salt rises 7.8 percent per year to 88 million metric tons in 2013."

--Section VI, pg. 123

OTHER STUDIES

Enzymes

US demand for enzymes will rise 4.8% annually through 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the \$2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 September 2010..... \$4900

World Specialty Silicas

World specialty silicas demand will rise 6.3% yearly through 2014, driven by growth in key silica markets such as tires, rubber, chemicals and agricultural products. Precipitated silica will remain the dominant product type and lead gains. The Asia/Pacific region will grow at the fastest pace. This study analyzes the two million metric ton world specialty silica industry, with forecasts for 2014 and 2019 by product, market, world region and for 14 countries. It also evaluates company market share and profiles industry participants.

#2644 June 2010 \$5800

Food & Beverage Additives

US demand for food and beverage additives is forecast to expand 3.5 percent annually through 2014. Flavor products and alternative sweeteners will remain the largest product types, while nutraceuticals (e.g., vitamins, minerals, herbal extracts, probiotics) will see the most rapid gains. This study analyzes the \$7.2 billion US food and beverage additive industry, with forecasts for 2014 and 2019 by product and application. It also evaluates company market share and profiles industry competitors.

#2607 February 2010..... \$4800

Soy Chemicals

US soy chemical demand will grow 7.8% annually through 2013, driven by the continued penetration of biodiesel, and by the adoption of alternatives to traditional, petrochemical-based materials in manufacturing. Soy oil derivatives such as methyl soyate, polyols, soy-based foamed plastics, waxes and fatty acids hold particularly good prospects. This study analyzes the \$1.9 billion US soy chemical industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2538 September 2009..... \$4700

Alternative Sweeteners

US demand for alternative sweeteners is projected to grow 3.4% annually through 2013, as food processors and consumers seek healthier food options with fewer calories or less high fructose corn syrup. Sucralose, acesulfame potassium (ace-K), erythritol and stevia extract rebianna (reb-A) will see above average gains. This study analyzes the \$1.1 billion US alternative sweetener industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2497 May 2009..... \$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)