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Specialty Silicas

US Industry Study with Forecasts for **2015 & 2020**

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1 US Specialty Silica
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by Company, 2010 162

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Gains will be fueled by strong growth in the sizable precipitated silica segment, as well as above-average gains for fumed silica, both driven by renewed growth in the large rubber market.

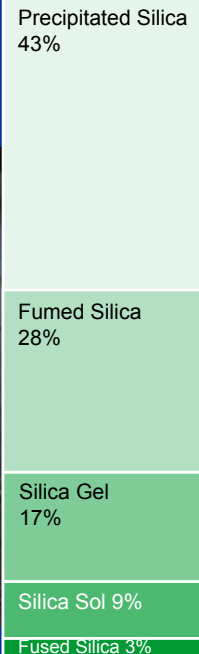
US demand to rise 5.8% annually through 2015

US demand for specialty silicas is forecast to rise 5.8 percent annually to \$1.7 billion in 2015. Market volume will also climb at a healthy clip, rebounding from the declines of the recession-impacted 2005-2010 period. Specialty silica demand will benefit as the economy recovers and growth in manufacturing output resumes. Market expansion will be fueled by strong growth in the sizable precipitated silica segment, as well as above-average gains for fumed silica. Advances for both product types will primarily stem from renewed growth in the large rubber market, as production levels in key sectors, such as motor vehicles and industrial machinery, increase robustly.

Fumed silica to be fastest growing product

Fumed silica is expected to be the fastest-growing segment of the specialty silica market through 2015. Gains will be fueled by a strong rebound in nontire rubber consumption following the significant declines experienced between 2005 and 2010. Precipitated silica will remain the leading segment of the specialty silica market in both volume and value terms. This silica type is expected to advance roughly in line with the overall market through 2015, promoted by above-average gains in the large rubber sector. In particular, advances will be supported by the growing utilization of precipitated silica in silica-

US Specialty Silica Demand (\$1.3 billion)



reinforced low rolling-resistance tires, which offer greater fuel efficiency than conventional tires. Precipitated silica will also find use in a number of other markets. Among these, plastics and chemicals are projected to offer the best opportunities for growth.

Rubber market to offer best growth opportunities

Among specialty silica markets, the rubber market is forecast to expand at the most rapid pace through 2015, when it will reclaim its position as the leading outlet for specialty silicas in dollar terms. This market can be divided into tire and nontire applications, with the better growth prospects expected for nontire

rubber. This segment -- which includes the production of silicone rubber and industrial rubber products -- is forecast to rise at a double-digit annual pace from a depressed 2010 base. Advances will be fueled by increased US rubber consumption, as domestic production of motor vehicles and other manufactured goods improves considerably. In the tire segment, precipitated silica will increasingly find use in low rolling-resistance tires, demand for which will be promoted by efforts on the part of vehicle manufacturers to improve fuel efficiency in order to comply with ever more stringent governmental regulations, as well as to satisfy consumer demand for improved gas mileage.

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Sample Text, Table & Chart

PRODUCTS

Supply & Demand

The US market for precipitated silica is forecast to expand 5 percent annually to 2015, rebounding from a 2009 low. Weak performance in 2009 and 2010 will be offset by demand will continue to benefit from the use of silica in tires. Replacement for black in tire reinforcement will be provided by increases in rubber demand. The decline in rubber demand from 2009 to 2010 is expected to be offset by the decade from 2010 to 2015. Demand in a variety of other markets, including coatings, chemicals, and coatings and inks markets is expected to be favorable. However, overall volume gains will be restricted by maturity in such markets as agriculture and animal health, food and beverages, and paper and textiles.

Historically, international trade in precipitated silica has been limited by high transportation costs. However, in the mid- to late 1990s, domestic overcapacity combined with strong European demand for silica in "green" tire applications led to increased export activity. In 2010, exports accounted for about one-third of US precipitated silica production, up from about one-fifth in 2005. Although the US is projected to remain a net exporter of precipitated silica throughout the forecast period, advances are forecast to decelerate as precipitated silica production increases in other countries, particularly China. Nevertheless, US exports will continue to expand as precipitated silica demand increases in regions which lack sufficient capacity.

Although the flow of precipitated silica into the US will slow from the pace of the 2005-2010 period, US imports of precipitated silica are projected to outpace exports through 2015. Precipitated silica is manufactured in various nations throughout the world. A large share of imports comes from Asia and Western Europe, with Germany being particularly important. However, transportation costs are expected to remain a significant barrier to trade.

TABLE III-6

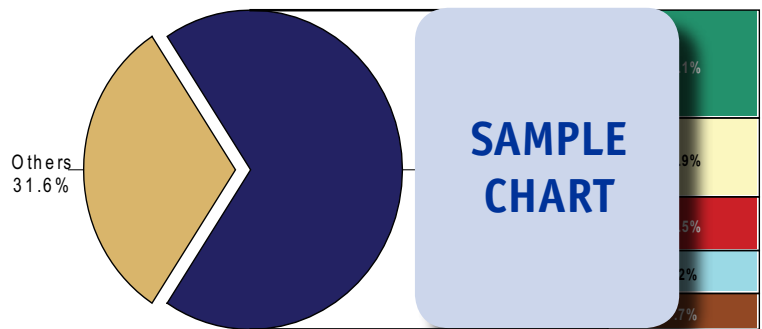
FUMED SILICA MARKETS
(million pounds)

Item	2000	2005	2010	2015	2020
Fumed Silica Demand					30
Electrical & Electronic Equipment					1
Rubber					4
Plastics					6
Coatings & Inks					0
Adhesives & Sealants					0
Food & Beverages					6
Cosmetics & Toiletries					4
Other					9
\$/lb					8
Fumed Silica Demand (mil \$)					60

SAMPLE TABLE

CHART V-1

US SPECIALTY SILICA MARKET SHARE BY COMPANY
(\$1.3 billion, 2010)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-13
ELECTRICAL & ELECTRONIC EQUIPMENT MARKET
FOR SPECIALTY SILICAS BY TYPE
 (million pounds)

Item	2000	2005	2010	2015	2020
Electronic Component Shipments (bil \$)					5
lb silica/mil \$ electronic components					6
Specialty Silica Demand					6
Fumed Silica					1
Silica Sol					1
Precipitated Silica					4
\$/lb	2				3
Specialty Silica Demand (mil \$)					3
% electrical & electronic	9	100	120	117	121
Total Specialty Silica Demand (mil \$)	910	1170	1300	1720	2090



COMPANY PROFILES

Industrias Químicas del Ebro SA

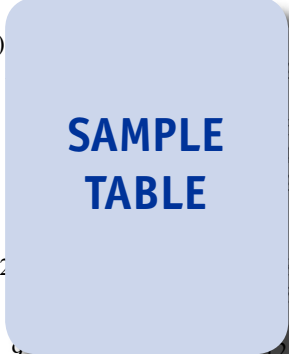
Poligono Industrial de Malpica
 Calle D 97
 Zaragoza
 Spain
 34-976-5
 http://ww

Sales: \$
 Employr

Key Proc

Industrias Químicas del Ebro (Grupo IQE) specializes in the manufacture of soluble silicates and derivatives. The privately held company sells its products to the detergents, ceramics, rubber, paint, construction, water treatment, paper, food and beverage, and electrodes markets, among others.

The Company participates in the US specialty silica industry through the IQESIL SA subsidiary (Spain), which manufactures precipitated silicas and aluminum silicates. IQESIL's silicas, which are sold under the IBERSIL and EBROSIL brand names, are made in fine powder, compact granular and spherical forms for a range of industrial, consumer and other markets. IBERSIL silicas feature high absorption qualities and can be used as anticaking agents in human and animal food applications, as carriers for additives, and in the pharmaceutical and coatings markets. Among these silicas are the D-100 grade, which has enhanced performance in milling applications; D-250 grade, which has larger particle sizes and is typically used as a carrier; and A-150 grade with small particle size for use as an anticaking and fluidizing agent. The company's EBROSIL silicas are intended for reinforcing



"Specialty silica demand in the electrical and electronic equipment market is projected to expand 3.4 percent per year to 59 million pounds in 2015, reaching \$202 million. Volume gains are projected to benefit from rising electronic component shipments following the declines of the 2000-2010 period. Growth in market value will be limited to some degree by an expected deceleration in pricing gains through 2015. Advances will also be restricted by ..."
 --Section IV, pg. 112

OTHER STUDIES

World Silicones

This study examines the world market for silicones. It presents historical demand data for the years 2000, 2005 and 2010 and forecasts for 2015 and 2020 by market (e.g., construction, chemical, health care, transportation, electrical and electronic), product (e.g., fluids, elastomers, resins, gels), world region and for 15 national markets. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2779 August 2011 \$5900

Silicones

US demand for silicones is forecast to rise 5.3 percent annually through 2014. Consumer goods such as cosmetics and toiletries will remain a fast growing market, as will medical products. Silicone gels will be the fastest growing type, driven by robust growth in demand for gel encapsulants in LED and photovoltaic applications. This study analyzes the \$2.8 billion US silicone industry, with forecasts for 2014 and 2019 by product, market and application. It also evaluates company market share and profiles industry players.

#2665 July 2010 \$4700

World Specialty Silicas

World specialty silica demand will rise 6.3 percent 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

Industrial Rubber Products

US industrial rubber product demand will rise 6 percent yearly through 2014, driven mainly by rebounding levels of motor vehicle production and accelerating output in the machinery industry. Mechanical rubber goods will remain dominant and grow the fastest. Machinery will be the fastest growing market. This study analyzes the \$13.2 billion US industrial rubber product industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2620 April 2010 \$4800

World Rubber & Tire

Global rubber consumption will rise 4.1 percent yearly through 2013. The Asia/Pacific region will remain the largest and fastest-growing market. Non-tire rubber demand will outpace tire rubber. Tire rubber will continue to benefit from strong growth in Asia, despite a decline in rubber usage per tire. This study analyzes the 22 million metric ton world rubber industry, with forecasts for 2013 and 2018 by type, market, world region and for 30 countries. It also evaluates company market share and profiles industry players.

#2575 January 2010 \$5900

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