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World Salt

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

Study #2857 | February 2012 | \$5900 | 286 pages



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

www.freedoniagroup.com

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Growth in chemical manufacturing output will fuel the majority of additional demand between 2010 and 2015, largely due to the continued rapid expansion of chemical production in China.

Global demand to rise 2.9% annually through 2015

Global demand for salt is projected to climb 2.9 percent annually through 2015 to 327 million metric tons, valued at \$13.4 billion. Increased salt consumption in most parts of the world will more than offset expected contractions of demand in Western Europe and Japan. Growth in chemical manufacturing output will fuel the majority of additional demand between 2010 and 2015, largely due to the continued rapid expansion of chemical production in China. Salt suppliers will also benefit from the shale gas drilling boom currently underway in North America, which will boost chloralkali output in the US and Canada.

China to be fastest growing national market

In 2010, China was the largest consumer of salt, primarily due to the huge size of its chemical industry, although food processing and livestock salt use are also substantial because of the nation's 1.3 billion residents. China accounted for one-fourth of global salt demand in 2010 and is projected to be the fastest growing national market through 2015. Salt consumption in India is also forecast to grow well above the world average. Chemical output by facilities in India is forecast to rise faster than in any other major producing country through 2015, leading to sizable increases in associated salt demand. As in China, growth in the size of India's population will also contribute to overall salt market gains.

World Salt Demand, 2015 (327 million metric tons)



Solar evaporation to gain share of salt production

Solar evaporation is the most prevalent method of producing salt, accounting for 38 percent of 2010 industry shipments. It is the most economical method of producing salt in areas with favorable weather conditions, which include a number of nations in the Africa/Mideast and Asia/Pacific regions. Salt production is forecast to grow fastest in these regions, and as a result solar evaporation will account for an increasing share of global salt output through 2015. Rock salt and brine production will also post moderate increases through 2015, although their respective rates of growth will lag that of solar evaporation.

Chemical manufacturing is dominant salt market

Chemical manufacturing is by far the largest market for salt, accounting for nearly 55 percent of global demand in 2010. The vast majority of demand in this market is generated by chloralkali and synthetic soda ash producers, which use salt as their primary feedstock. The Asia/Pacific region accounts for over one-half of the salt consumed by the chemical industry. Western Europe and North America also have sizable chemical industries, and in 2010 they accounted for 18 percent and 15 percent, respectively, of chemical manufacturing salt use.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Salt Supply & Demand

In 2010, salt consumption in China reached 78.0 million metric tons with a value of \$1.2 billion. China's salt demand (in volume terms) is the largest in the world and larger than most other countries. China's salt demand grew 9.2 percent from 2000 to 2010. China is the largest market for salt over the past decade and is expected to remain the largest market primarily due to the need for salt in the chemical manufacturing sector, which has posted double-digit annual increases in salt consumption over the past decade and represented 78 percent of domestic demand. Suppliers have also benefited from healthy increases in demand in the high-value food processing market, the nation's second biggest market for salt.

**SAMPLE
TEXT**

China is the largest salt producer in the world, surpassing the US to become the leading producing country around 2005. In 2010, the country's salt shipments were 70.0 million metric tons, accounting for one-fourth of global output. The largest share of salt is produced by solar evaporation, either from the sea or from China's inland salt lakes. However, a significant amount of rock salt mining and producing salt as brine also occur in the country. Brine production, in particular, has increased to meet growing salt demand in the chemical manufacturing market. Vacuum pan production comprises a much smaller share of overall salt production.

China is a net importer of salt due to the rapid rise in salt demand that took place between 2000 and 2010, which outstripped domestic producers' capacities. In 2010, the country was left with a trade deficit equivalent to two percent of domestic demand. The majority of salt imports come from Australia. Mexico and India are also significant suppliers. The principal markets for China's salt exports are South Korea.

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TABLE VI-3

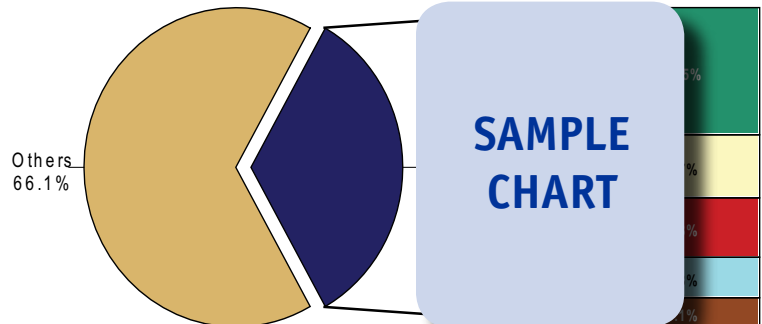
CHINA: SALT SUPPLY & DEMAND
(million metric tons)

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009\$)	10	15	20	25	30
\$ GDP/capita	10	15	20	25	30
Population (mil persons)	1.2	1.3	1.4	1.5	1.6
m tons salt/mil \$ GDP	0.8	0.9	1.0	1.1	1.2
m tons salt/000 persons	0.8	0.9	1.0	1.1	1.2
Salt Demand	10	15	20	25	30
- imports	0	0	0	0	0
+ exports	0	0	0	0	0
Salt Shipments	10	15	20	25	30
% China	7	7	7	7	7
Asia/Pacific Salt Shipments	6	6	6	6	6

**SAMPLE
TABLE**

CHART VIII-1

WORLD SALT MARKET SHARE
(\$10.4 billion, 2010)

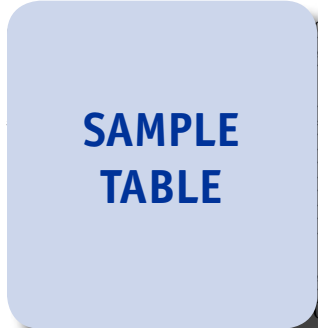


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-4
CHINA: SALT DEMAND BY MARKET
(million metric tons)

Item	2000	2005	2010	2015	2020
Asia/Pacific Salt Demand % China					
Salt Demand					
Chemical Manufacturing					
Food Processing					
Livestock					
Road Deicing & Other					
\$/metric ton					
Salt Demand (mil \$)					



COMPANY PROFILES

Italkali Società Italiana Sali Alcalini SpA

Via P.pe Granatelli 46
 Palermo, Sicily 90139
 Italy
 39-91-602-911
 http://www.ita
 Annual Sales:
 Geographic sa
 Italy 80%, Out
 Employment:



Key Products:

Italkali Societa Italiana Sali Alcalini is a leading producer of rock salt in Italy. The privately held company also makes vacuum salt and sea salt.

The Company's products include rock salt, sea salt and vacuum salt for human consumption, food processing, water-softening, industrial, deicing and animal feed applications. For human consumption, Italkali makes over 15 products, including table salts under such brand names as 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 iodine by adding potassium iodate. Italkali's salt for the food processing industry includes SALE DI SICLIA, which is an extra-pure rock salt available in bulk bags. The Company's water-softening salts comprise products sold under the CRISTALLI DI SALGEMA and DEPUREL brand names. For example, CRISTALLI DI SALGEMA is rock salt with extra-pure crystal designs to achieve a slow and constant dissolve. Products for the industrial sector include TINTOREL vacuum salt for dyeing applications; SALE DI SOLE raw, washed or dried sea salt; and rock salt

"Shipments of salt by Chinese producers are expected to climb at a 6.5 percent annual pace through 2015 to 96.0 million metric tons, about the same rate as demand growth, but not fast enough to prevent a further widening of the country's trade deficit in salt. Domestic manufacturers will benefit from robust local sales conditions, leading to further expansion in industry output."
 --Section VI, pg. 133

OTHER STUDIES

World Agricultural Pesticides

World demand for formulated agricultural pesticides is forecast grow 3.8 percent annually through 2016 to \$59 billion. The fastest growth is expected in developing countries of Eastern Europe, South America, and Asia. Product demand will benefit from more value-added pesticide formulations with multiple active ingredients. This study analyzes the \$49 billion world agricultural pesticide industry, with forecasts for 2016 and 2021 by product, market, world region and for 43 countries. The study also evaluates company market share and profiles industry participants.

#2902 August 2012 \$6200

World Activated Carbon

World demand for activated carbon will rise 10.3 percent annually through 2016 to 1.9 million metric tons. Gains will be driven mainly by more government controls on power plant and factory emissions in the US and China. India will surpass Germany to become the fourth largest market, behind Japan. This study analyzes the 1.2 million metric ton global activated carbon industry, with forecasts for 2016 and 2021 by type, application, market, world region and for 17 countries. The study also evaluates company market share and profiles industry participants.

#2878 April 2012 \$6200

Pesticides

US demand for formulated pesticide products is forecast to increase 2.6 percent per year to \$12.1 billion in 2016. Gains will be driven in part by rising demand for new formulations used in multiple settings. Herbicides will remain the largest product segment and show the strongest growth. The agricultural market will remain dominant and grow the fastest. This study analyzes the \$10.7 billion US pesticides industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry competitors.

#2877 April 2012 \$4800

World Mining Equipment

The world market for mining equipment is projected to climb 8.5 percent annually through 2015 to \$92 billion. The Asia/Pacific region will remain the fastest growing market. Metals and coal mining will lead gains by application. Mining drills and breakers will pace demand among product segments. This study analyzes the \$61 billion world mining equipment industry, with forecasts for 2015 and 2020 by application, product, world region and for 31 countries. The study also evaluates company market share and profiles industry competitors.

#2840 January 2012 \$6200

Shale Gas: Products & Services

Demand for products and services used in US shale gas development will grow 12.5 percent annually through 2015, as activity continues to escalate in emerging shale plays. Drilling equipment and consumables, and fluids and materials will both grow equally fast. Gains for services will be led by pressure pumping, and completion and production. This study analyzes the \$29 billion US shale gas product and service industry, with forecasts for 2015 and 2020 by type, region and shale play. The study also evaluates company market share and profiles industry players.

#2777 August 2011 \$4900

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