

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 5](#)

[Sample Text, Table  
& Chart 6](#)

[Sample Profile, Table &  
Forecast 7](#)

[Order Form & Corporate  
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[About Freedonia,  
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# World Fluorochemicals

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Industry Study with Forecasts for **2016 & 2021**

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Study #2869 | April 2012 | \$6100 | 384 pages

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## Table of Contents

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT

General .....	4
World Economic Overview .....	4
Recent Historical Trends.....	5
World Economic Outlook.....	6
World Population Outlook.....	10
World Fixed Investment Outlook.....	12
World Manufacturing Outlook .....	14
World Motor Vehicle Overview .....	16
World Motor Vehicle Park.....	17
World Motor Vehicle Production.....	18
World Cooling & Refrigeration Outlook.....	21
Cooling Equipment .....	21
Commercial Refrigeration.....	23
Residential Refrigeration .....	25
World Foamed Plastic Insulation Outlook ..	27
World Aluminum Outlook.....	30
Environmental/Regulatory Considerations	33
Environmental Impact .....	34
Montreal Protocol .....	37
Kyoto Protocol .....	39

### OVERVIEW

Product Overview .....	42
Fluorocarbons.....	44
HCFCs.....	48
HFCs .....	51
Other .....	55
Inorganics & Specialties.....	59
Fluoropolymers .....	62
Market Overview .....	65
Aluminum Production .....	68
Refrigerants .....	70
Commercial.....	74
Residential.....	76
Motor Vehicles.....	78
Blowing Agents .....	82
Other .....	84
Components .....	86
Water Treatment .....	87
Electronics.....	88
Chemical Intermediates.....	89
Aerosols, Solvents & All Other.....	90

Regional Overview.....	92
Demand.....	92
Production .....	95
Trade Flows.....	98

### NORTH AMERICA

Economic Overview.....	101
Fluorochemical Demand.....	103
United States .....	105
Canada .....	116
Mexico .....	124

### WESTERN EUROPE

Economic Overview.....	133
Fluorochemical Demand.....	135
Germany .....	138
Italy .....	146
France.....	154
Spain .....	162
United Kingdom.....	169
Other Western Europe .....	177

### ASIA/PACIFIC

Economic Overview.....	186
Fluorochemical Demand.....	188
China .....	191
Japan.....	203
India .....	213
South Korea .....	222
Australia.....	231
Other Asia/Pacific .....	239

### OTHER REGIONS

Central & South America .....	248
Brazil.....	252
Other Central & South America .....	259
Eastern Europe .....	267
Russia .....	271
Other Eastern Europe.....	279
Africa/Mideast.....	286

### INDUSTRY STRUCTURE

General .....	296
Market Share .....	299

Industry Restructuring .....	303
Competitive Strategies.....	305
Product Focus/Specialization .....	305
Product Differentiation .....	307
Research & Development.....	308
Cooperative Agreements.....	310
Marketing & Distribution .....	314

### COMPANY PROFILES

Air Products and Chemicals.....	317
Arkema SA .....	320
Asahi Glass .....	324
Daikin Industries .....	328
DuPont (EI) de Nemours.....	334
Honeywell International.....	340
Mexichem SAB .....	344
Mitsui Chemicals.....	347
Solvay SA .....	349
South African Nuclear Energy .....	356
3M Company .....	358
Other Companies in the World	
Fluorochemical Industry.....	363

## 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 Gross Fixed Capital	
Formation by Region .....	14
4 World Manufacturing Value	
Added by Region.....	16
5 World Motor Vehicle Park.....	18
6 World Motor Vehicle Production.....	20
7 World Cooling Equipment	
Shipments by Region.....	23
8 World Commercial Refrigeration	
Shipments by Region.....	25

(continued on following page)

## List of Tables/Charts

(continued from previous page)

9 World Refrigerator & Freezer Production by Region .....	27
10 World Foamed Plastic Insulation Demand by Region .....	29
11 World Primary Aluminum Production by Region .....	32
Cht World Primary Aluminum Production by Region, 2001-2021 .....	33
12 Ozone Depletion & Global Warming Potentials for Selected Fluorocarbons .....	36

### OVERVIEW

1 World Fluorochemical Demand by Product .....	43
Cht World Fluorochemical Demand by Product, 2001-2021 .....	44
2 World Fluorocarbon Demand by Product, Market & Region.....	47
Cht World Fluorocarbon Demand by Product, 2001-2021 .....	48
3 World HCFC Demand by Product, Market & Region .....	51
4 World HFC Demand by Product, Market & Region .....	55
5 World Other Fluorocarbon Demand by Product, Market & Region.....	58
6 World Inorganic & Specialty Fluorochemical Demand by Product & Region.....	62
7 World Fluoropolymer Demand by Product & Region.....	65
8 World Fluorochemical Demand by Market .....	67
Cht World Fluorochemical Demand by Market, 2011 .....	68
9 World Aluminum Production Markets for Fluorochemicals by Region.....	70
10 World Refrigerants Market for Fluorochemicals by Application, Product & Region.....	74
11 World Commercial Refrigerant Market for Fluorochemicals by Region.....	76
12 World Residential Refrigeration Market for Fluorochemicals by Region.....	78

13 World Motor Vehicle Refrigerant Market for Fluorochemicals by Sector, Product & Region .....	81
14 World Blowing Agent Market for Fluorochemicals by Product & Region.....	84
15 World Other Markets for Fluorochemicals by Product, Market & Region.....	86
16 World Fluorochemical Demand by Region .....	94
Cht World Fluorochemical Demand by Region, 2011 .....	95
17 World Fluorochemical Production by Region .....	97
Cht World Fluorochemical Production by Region, 2011 .....	98
18 World Fluorochemical Net Exports by Region .....	100

### NORTH AMERICA

1 North America: Fluorochemical Supply & Demand.....	102
2 North America: Fluorochemical Demand by Product .....	104
Cht North America: Fluorochemical Demand by Country, 2011.....	105
3 United States: Fluorochemical Supply & Demand.....	108
4 United States: Fluorochemical Demand by Product .....	111
Cht United States: Fluorochemical Demand by Product .....	112
5 United States: Fluorochemical Demand by Market .....	114
6 Canada: Fluorochemical Supply & Demand.....	118
7 Canada: Fluorochemical Demand by Product .....	120
Cht Canada: Fluorochemical Demand by Product .....	121
8 Canada: Fluorochemical Demand by Market .....	123
9 Mexico: Fluorochemical Supply & Demand.....	126
10 Mexico: Fluorochemical Demand by Product .....	128

Cht Mexico: Fluorochemical Demand by Product .....	129
11 Mexico: Fluorochemical Demand by Market .....	131

### WESTERN EUROPE

1 Western Europe: Fluorochemical Supply & Demand.....	135
2 Western Europe: Fluorochemical Demand by Product & Market .....	137
Cht Western Europe: Fluorochemical Demand by Country, 2011.....	138
3 Germany: Fluorochemical Supply & Demand.....	140
4 Germany: Fluorochemical Demand by Product .....	142
Cht Germany: Fluorochemical Demand by Product .....	143
5 Germany: Fluorochemical Demand by Market .....	145
6 Italy: Fluorochemical Supply & Demand.....	148
7 Italy: Fluorochemical Demand by Product .....	150
Cht Italy: Fluorochemical Demand by Product .....	151
8 Italy: Fluorochemical Demand by Market .....	153
9 France: Fluorochemical Supply & Demand.....	156
10 France: Fluorochemical Demand by Product .....	158
Cht France: Fluorochemical Demand by Product .....	159
11 France: Fluorochemical Demand by Market .....	161
12 Spain: Fluorochemical Supply & Demand.....	164
13 Spain: Fluorochemical Demand by Product .....	166
Cht Spain: Fluorochemical Demand by Product .....	167
14 Spain: Fluorochemical Demand by Market .....	168

(continued on following page)

## List of Tables/Charts

(continued from previous page)

15 United Kingdom: Fluorochemical Supply & Demand.....	171
16 United Kingdom: Fluorochemical Demand by Product .....	173
Cht United Kingdom: Fluorochemical Demand by Product .....	174
17 United Kingdom: Fluorochemical Demand by Market .....	176
18 Other Western Europe: Fluorochemical Supply & Demand.....	179
19 Other Western Europe: Fluorochemical Demand by Country & Product.....	181
Cht Other Western Europe: Fluorochemical Demand by Product .....	182
20 Other Western Europe: Fluorochemical Demand by Market .....	184

### ASIA/PACIFIC

1 Asia/Pacific: Fluorochemical Supply & Demand.....	188
2 Asia/Pacific: Fluorochemical Demand by Product & Market .....	190
Cht Asia/Pacific: Fluorochemical Demand by Country, 2011.....	191
3 China: Fluorochemical Supply & Demand.....	194
4 China: Fluorochemical Demand by Product .....	197
Cht China: Fluorochemical Demand by Product .....	198
5 China: Fluorochemical Demand by Market .....	201
6 Japan: Fluorochemical Supply & Demand.....	206
7 Japan: Fluorochemical Demand by Product .....	208
Cht Japan: Fluorochemical Demand by Product .....	209
8 Japan: Fluorochemical Demand by Market .....	211
9 India: Fluorochemical Supply & Demand.....	216
10 India: Fluorochemical Demand by Product .....	218

Cht India: Fluorochemical Demand by Product .....	219
11 India: Fluorochemical Demand by Market .....	221
12 South Korea: Fluorochemical Supply & Demand.....	225
13 South Korea: Fluorochemical Demand by Product .....	227
Cht South Korea: Fluorochemical Demand by Product .....	228
14 South Korea: Fluorochemical Demand by Market .....	230
15 Australia: Fluorochemical Supply & Demand.....	233
16 Australia: Fluorochemical Demand by Product .....	235
Cht Australia: Fluorochemical Demand by Product .....	236
17 Australia: Fluorochemical Demand by Market .....	238
18 Other Asia/Pacific: Fluorochemical Supply & Demand.....	241
19 Other Asia/Pacific: Fluorochemical Demand by Country & Product.....	243
Cht Other Asia/Pacific: Fluorochemical Demand by Product .....	244
20 Other Asia/Pacific: Fluorochemical Demand by Market .....	246

### OTHER REGIONS

1 Central & South America: Fluorochemical Supply & Demand.....	250
2 Central & South America: Fluorochemical Demand by Product & Market.....	252
3 Brazil: Fluorochemical Supply & Demand.....	254
4 Brazil: Fluorochemical Demand by Product .....	256
Cht Brazil: Fluorochemical Demand by Product .....	257
5 Brazil: Fluorochemical Demand by Market .....	259
6 Other Central & South America: Fluorochemical Supply & Demand.....	261

7 Other Central & South America: Fluorochemical Demand by Country & Product.....	264
Cht Other Central & South America: Fluorochemical Demand by Product .....	265
8 Other Central & South America: Fluorochemical Demand by Market .....	267
9 Eastern Europe: Fluorochemical Supply & Demand.....	269
10 Eastern Europe: Fluorochemical Demand by Product & Market .....	271
11 Russia: Fluorochemical Supply & Demand.....	274
12 Russia: Fluorochemical Demand by Product .....	276
Cht Russia: Fluorochemical Demand by Product .....	277
13 Russia: Fluorochemical Demand by Market .....	279
14 Other Eastern Europe: Fluorochemical Supply & Demand.....	281
15 Other Eastern Europe: Fluorochemical Demand by Product .....	283
Cht Other Eastern Europe: Fluorochemical Demand by Product .....	284
16 Other Eastern Europe: Fluorochemical Demand by Market .....	286
17 Africa/Mideast: Fluorochemical Supply & Demand.....	289
18 Africa/Mideast: Fluorochemical Demand by Country & Product.....	291
Cht Africa/Mideast: Fluorochemical Demand by Product .....	292
19 Africa/Mideast: Fluorochemical Demand by Market .....	294

### INDUSTRY STRUCTURE

1 World Fluorochemical Sales by Company, 2011.....	297
Cht World Fluorochemical Market Share by Company, 2011.....	299
2 Selected Acquisitions & Divestitures .....	305
3 Selected Cooperative Agreements ...	312

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*Gains in global fluorochemical demand will be fueled by increasing production of refrigeration and cooling equipment worldwide, as well as by an acceleration in primary aluminum output.*

## World demand to rise 3.9% annually through 2016

Global demand for fluorine-containing chemicals is forecast to rise 3.9 percent per year to 3.5 million metric tons in 2016, valued at \$19.7 billion. Gains will be fueled by increasing production of refrigeration and cooling equipment worldwide, as well as by an acceleration in primary aluminum output. However, fluorochemical suppliers face a number of challenges. The first is obtaining access to key raw materials such as fluorspar, as exports from China -- by far the world's leading producer -- have increasingly come under restrictions. Another challenge is dealing with the ever-shifting regulatory environment for fluorocarbons, which are subject to multiple global and national regulations that vary considerably by region and change over time. Finally, competition with alternative products is intensifying in a number of sectors -- particularly in the blowing agent and commercial refrigeration industries -- placing pressure on fluorochemical suppliers serving these markets.

## Fluoropolymers to be fastest growing products

Among other fluorochemical products, fluoropolymers will see the most rapid gains in demand, driven by expanding opportunities for high-performance materials in the motor vehicle, chemical processing, electronics, and coatings markets. Fluoropolymers have a very

## World Fluorochemical Demand (2.9 million metric tons, 2011)

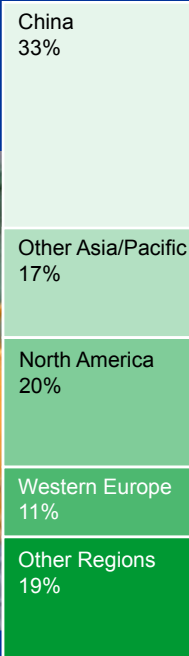


photo: RTR Suppliers

low penetration rate in many parts of the world, offering ample room for market growth. Demand for inorganic and specialty fluorochemicals will rise at a pace close to the overall average through 2016, benefiting from strong growth in global aluminum production. Additionally, rising production of semiconductors, advanced batteries, and other electronic components will fuel demand for specialty gases and other high-value fluorochemicals.

## Shifts taking place among fluorocarbon products

In the fluorocarbon segment, demand will rise at a rate slightly below the overall fluorochemical average through

2016. However, significant shifts are taking place among individual products. Due to Montreal Protocol requirements, developed world countries are in the final stages of phasing out ozone-depleting HCFCs, while restrictions for developing countries will begin to take effect in 2015. As a result, HCFC demand will decline going forward. Demand for HFCs grew considerably from 2001 to 2011, and they will continue their strong advances as replacements for HCFCs in the developing world. However, concerns over the global warming potential (GWP) of HFCs will begin to limit demand, particularly in Western Europe, presenting opportunities for low-GWP HFO fluorocarbons to penetrate the market.

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**Sample Text,  
 Table & Chart**

**ASIA/PACIFIC**

**China: Fluorochemical Products**

Demand for fluorochemicals in China is projected to rise 15 percent annually through 2016. China has one of the world's fastest growing economies, the country's fluorochemical demand is well above the global average. Demand for HFCs and fluoropolymers is expected for expansion. However, over the past decade demand rose more than 15 percent per year. Restraining further growth will be a concerted effort on the part of the Chinese government to bring economic growth to sustainable levels, particularly in the manufacturing sector. As a result, key fluorochemical-consuming industries such as aluminum, motor vehicles, and refrigeration and cooling equipment will see marked decelerations through 2016.

Restrictions implemented as part of the Montreal Protocol are beginning to have a noticeable effect on fluorocarbon consumption in China, and will continue to do so going forward. Although demand will still increase at a strong pace, considerable shifts in the product mix are expected. The Protocol requires Article 5 (developing) countries to begin phasing out HCFCs in 2015 and, as a result, HCFC demand in China will start to decline through 2016 and fall at an accelerated rate through 2021. The Chinese government announced in 2011 that it would not approve construction of new HCFC-22 capacity, and limited the size of new HCFC-142b projects in the country. Consumption of HCFCs will, however, benefit a great deal from the forthcoming HCFC demand. As companies in China have already begun to make the transition from HCFCs, HFC demand rose more than sixfold from 2000. Through 2016, the market for HFCs is expected to continue to grow at a rapid pace. CFC demand in China will maintain its long-term growth, although a substantial black market for replacement CFC refrigerants is expected to persist.

**SAMPLE  
 TEXT**

**TABLE VI-3**

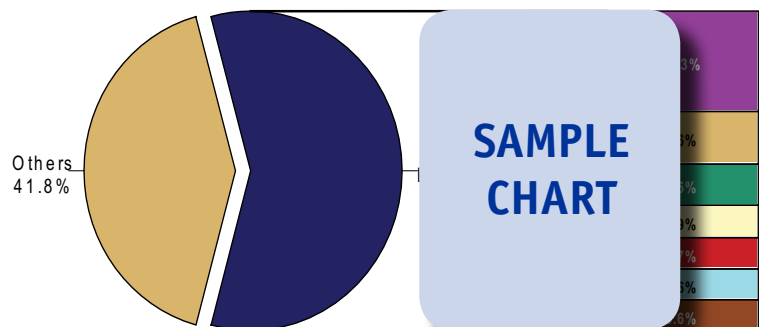
**CHINA:  
 FLUORO-CHEMICAL SUPPLY & DEMAND**

Item	2001	2006	2011	2016	2021
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2010\$)					
Gross Fixed Capital Formation (bil 2010\$)					
Manufacturing Value Added (bil 2010\$)					
Motor Vehicles in Use (mil)					
Commercial Refrigeration Shtpts (mil \$)					
Aluminum Production (000 metric tons)					
Fluorochemical Demand (000 metric tons)					
+ net exports					
Fluorochemical Production (000 m tons)					

**SAMPLE  
 TABLE**

**CHART VIII-1**

**WORLD FLUORO-CHEMICAL MARKET SHARE BY COMPANY  
 (\$15.3 billion, 2011)**

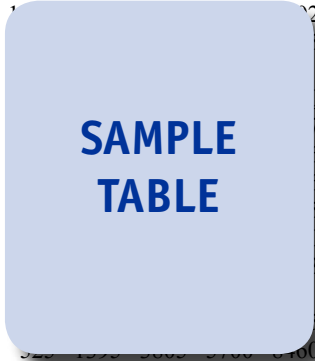


**SAMPLE  
 CHART**

## Sample Profile, Table & Forecast

**TABLE VI-4**  
**CHINA: FLUORO-CHEMICAL DEMAND BY PRODUCT**  
 (thousand metric tons)

Item	2001	2006	2011	2016	2021
Population (million persons)					
kg fluorochemical/capita					
Fluorochemical Demand					
Fluorocarbons:					
HCFCs					
HFCs					
Other					
Inorganics & Specialties					
Fluoropolymers					
\$/kg					
Fluorochemical Demand (mil \$)					



**COMPANY PROFILES**

**South African Nuclear Energy Corporation**  
 Church Street West Extension  
 Brits Magisterial District  
 North West Province  
 Pelindaba, Pre  
 South Africa  
 27-12-305-49  
 http://www.n

Revenues: \$  
 Employment

Key Products

**SAMPLE  
 PROFILE**

South African Nuclear Energy Corporation (Necsa) is a state owned company that is primarily involved in the nuclear science and radiation technology industry, including operations related to nuclear fuel, radiochemistry and radiopharmaceuticals. The Company's operations also include activities in fluorine chemistry and engineering services. Necsa operates in three segments: NTP Group, Pelchem Group and Corporate.

The Company participates in the world fluorochemical industry through the Pelchem Group segment, which includes the Pelchem Pty Limited subsidiary (Pelindaba, South Africa). In FY 2011, the company generated sales of \$22 million. Pelchem is engaged in the production and supply of organic and inorganic fluorochemicals for such markets as semiconductor, electronic, petrochemical, metallurgical, refrigeration, detergent, polymer, agricultural chemical, pharmaceuticals, consumables and construction. Fluorochemicals are used in the manufacture of numerous products, including microchips and memory

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"China is a major consumer of inorganic and specialty fluorochemicals, which accounted for over half of total demand in 2011. Aluminum fluoride, for example, is used in the country's large and expanding aluminum industry. China is the world's largest manufacturer of primary aluminum, and the market for aluminum fluoride is further boosted by a reliance on less chemically efficient smelters. Although newer smelters consume significantly fewer fluorochemicals per ton of aluminum produced, China's aluminum sector will ..."  
 --Section VI, pg. 196

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**OTHER STUDIES**

**World Activated Carbon**

This study analyzes the global activated carbon industry. It presents historical demand data for 2001, 2006 and 2011, and forecasts for 2016 and 2021 by type (e.g., powdered, granular), application (liquid phase, gas phase), market (e.g., industrial, water treatment, food and beverage processing), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2878 ..... April 2012 ..... \$6200

**World Silicones**

World demand for silicones will rise 6.2 percent annually through 2015. The Asia/Pacific region will remain the largest and fastest-growing market. Electrical and electronic products will continue to be the leading outlet, bolstered by high-growth applications such as components for LEDs and solar energy products. This study examines the \$12.4 billion world market for silicones, with forecasts for 2015 and 2020 by market, product, world region and for 15 countries. The study also evaluates company market share and profiles industry participants.

#2779 ..... July 2011 ..... \$5900

**HVAC Equipment**

Demand in the US for heating, ventilation and air conditioning (HVAC) equipment is projected to increase 5.1 percent annually through 2015. Unitary air conditioners will offer the best opportunities in the cooling system market. Heat pumps will remain the largest type of heating equipment, and grow the fastest within that segment. This study analyzes the \$13.1 billion US HVAC equipment industry, with forecasts for 2015 and 2020 by fuel type, equipment type and market. The study also evaluates company market share and profiles industry players.

#2813 ..... November 2011 ..... \$5100

**World Rare Earths**

World rare earths demand will rise 7.1 percent annually through 2015, driven by gains in key markets such as battery alloys and permanent magnets. Neodymium and dysprosium will grow the fastest, while cerium will remain the most widely used. China will continue to dominate overall rare earths production. This study analyzes the 128 thousand metric ton world rare earths industry, with forecasts for 2015 and 2020 by product, market, world region and for 13 countries. The study also evaluates company market share and profiles industry players.

#2775 ..... July 2011 ..... \$6100

**Commercial Refrigeration Equipment**

Demand for commercial refrigeration equipment in the US is forecast to rebound through 2014, growing 7.2 percent annually. Growth will be strongest for the largest product segment, transportation systems. Distribution will post the strongest market gains, while foodservice remains the largest segment. This study analyzes the \$6.6 billion US commercial refrigeration equipment industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry players.

#2661 ..... July 2010 ..... \$4800

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