World Salt

Industry Study with Forecasts for 2018 & 2023

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Industry Study with Forecasts for 2018 & 2023

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Trends in the dominant chemical manufacturing market will continue to strongly influence growth in salt consumption, although road deicing and food production will also have a significant impact.

World demand to rise 1.5% annually through 2018

Global demand for salt is forecast to climb 1.5 percent annually to 325 million metric tons in 2018, valued at $13.4 billion. Trends in the dominant chemical manufacturing market will continue to strongly influence growth in salt consumption, although road deicing and food production will also have a significant impact. The Asia/Pacific region is by far the leading regional market for salt based on its large chlor-alkali industry, and Asia is also expected to lead growth in the future as it is seeing the most significant gains in regional chlor-alkali production. Food processing will continue to provide steady but slow growth in most countries, while demand for salt in road deicing is projected to drop back to more usual levels in countries that experienced harsh winters in 2013. Overall, China will remain the largest salt market worldwide while India is expected to register the fastest gains.

Asia/Pacific region to register best advances

Trends in the production of chlor-alkali chemicals (chlorine, caustic soda, and synthetic soda ash) will continue to have the most significant effect on regional salt demand. In the Asia/Pacific region, China and India are the largest chlor-alkali producers and have registered growth significantly above the global average over the past decade. While advances through 2018 will decelerate due to excess supply, Asia will still register the best advances in salt demand in the chemical market over that time. In the US, growth in chlor-alkali production is expected to accelerate, benefitting from low natural gas prices and a strong construction market. In contrast, Europe is expected to see stagnant-to-declining chlor-alkali output due to a weak pulp and paper industry and competition from chemical suppliers in Asia and the US.

Road deicing market to decline from recent high

Road deicing is the second largest application for salt worldwide, even though demand is concentrated in only a few large countries (the US alone controls nearly 60 percent of the market). Demand for road deicing salt is forecast to decline from an unusually high level in 2013, when both North America and Europe experienced particularly severe winters. Although alternatives to road salt continue to be pursued, especially in the US, salt remains the preferred winter road treatment and this will sustain demand going forward. In the food processing market, health concerns regarding high sodium intake are leading to salt reduction initiatives in developed areas. On the other hand, fast growth in processed food manufacturing is driving food salt consumption in developing countries.
through 2018, salt consumption in Russia is forecast to advance 1.1 percent per year to 11.4 million metric tons, valued at $450 million. Expansion in Russia’s chlor-alkali industry — supported by global output of PVC, pulp and paper, and other downstream products — will continue to drive salt demand in the chemical manufacturing market. Ongoing capacity increases in the chlor-alkali industry, which already stands as one of the world’s largest, will also boost salt use among chemical suppliers. For instance, RusVinyl — a joint venture between Russia’s Sibur and Belgium’s SolVin (itself a 75/25 venture between Belgium’s Solvay and Germany’s BASF) — is constructing a PVC plant in Kstovo, Russia capable of producing 225,000 metric tons of caustic soda per year (expected completion in late 2014).

Continued growth in Russia’s road deicing market is also expected to drive overall salt use through 2018, supported by an increased number of paved roads and expanding motor vehicle park. Expansions in the country’s food processing industry are projected to underpin growing demand for salt in food applications; however, contractions in Russia’s population will constrain advances. Among other markets, healthy rapid gains in the country’s overall manufacturing output are expected to support the use of salt in applications such as metal processing, drilling fluid, and water treatment.

Leading suppliers of salt in Russia include locally-based Russalt and Uralkali. Russalt mines rock salt from deposits in Iletsk, Lake Baskunchak, and the Angara-Lena basin. Uralkali, primarily a potash supplier, produces and sells salt to the road deicing and oil markets. Other locally-based suppliers include Tiretsky Solerudnik, which extracts from deposits in Russia’s Irkutsk region.
Italkali Società Italiana Sali Alcalini SpA
Via P.e Granatelli 46
Palermo, Sicily 90139
Italy
39-91-602-9111
http://www.italkali.com

Annual Sales: $114 million (2013, as reported by the company)
Geographic Sales: (2013, as a percent of total) Italy 78% and Other Countries 22%
Employment: 280 (2013, verified by company, 7/14)

Key Products: rock salt, sea salt, and vacuum salt

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 is active in the world salt industry through the production of rock salt, sea salt, and vacuum salt for food processing, human consumption, water softening, industrial, deicing, and animal feed end uses. Salt for the food processing industry includes SALE DI SICLIA, which is an extra pure rock salt available in bulk bags; and SALE DI SICILIA HYPER, which is an extra pure fine salt. For human consumption, the Company manufactures about 20 products, including table salts sold under such brand names as IPOSAL, ARMONIA DI SALE, FIOR DI SALE INTEGRALE, SALE DI SICILIA MARE ANTICO, and SALORO. Some of these salts contain low levels of sodium and are enriched with iodine via the addition of potassium iodate. Water softening salts made by Italkali include products sold under the CRISTALLI DI SALGEMMA and DEPUREL brand names. For example, CRISTALLI DI SALGEMMA is rock salt with extra pure crystal designs that result in a slow and constant dissolve.

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World Industrial & Institutional (I&I) Cleaning Chemicals
Global demand for I&I cleaning chemicals is projected to increase 4.3 percent per year to $46.3 billion in 2018. The fastest growth will occur in healthcare, due to a rise in the number of hospital stays and concerns about healthcare-associated infections (HAIs). China and the Asia/Pacific region will be the fastest growing markets. This study analyzes the $37.5 billion world I&I cleaning chemical industry, with forecasts for 2018 and 2023 by product, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.
#3207 November 2014 $6300

Biocides
Demand for specialty biocides in the US is forecast to rise 4.0 percent per year to $3.9 billion in 2018. A construction rebound will benefit the wood preservation and paint and coatings markets, while consumer spending and manufacturing gains will support uses in manufactured goods. Nitrogen compounds and organosulfurs will be the fastest growing types. This study analyzes the $3.1 billion US biocide industry, with forecasts for 2018 and 2023 by product, function and market. The study also evaluates company market share and profiles industry competitors.
#3211 September 2014 $5300

World Hydrogen
World consumption of captive and merchant hydrogen is projected to increase 3.5 percent annually through 2018 to more than 300 billion cubic meters. Gains will be driven by the increasing use of hydrogen in refinery hydrotreatment, especially in developing countries in Asia. Petroleum refining will remain the dominant market. This study analyzes the $23.1 billion world hydrogen industry, with forecasts for 2018 and 2023 by market, world region, and for 19 major countries. The study also evaluates company market share and profiles industry players.
#3165 June 2014 $6100

World Kaolin
Global demand for kaolin will rise 3.3 percent yearly to 28.7 million metric tons in 2017, valued at $4.4 billion. The Asia/Pacific region will remain the largest and fastest-growing geographic market. Paper and paperboard production will remain the largest market, while ceramics will be the most rapidly growing, driven mainly by ceramic proppants. This study analyzes the 24.4 million metric ton world kaolin industry, with forecasts for 2017 and 2022 by market, world region, and for 22 countries. The study also evaluates company market share and profiles industry players.
#3147 April 2014 $6200

World Water Treatment Chemicals
World water treatment chemical demand will rise 5.8 percent per year to $30.6 billion in 2017. The fastest growth will occur in developing regions, driven by rising industrial water quality standards, more complex manufacturing processes, and efforts to improve access to safe drinking water supplies and sanitation facilities. This study analyzes the $23.1 billion world water treatment chemical industry, with forecasts for 2017 and 2022 by product, market, world region, and for 16 countries. The study also evaluates company market share and profiles industry players.
#3122 January 2014 $6100

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