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World Dyes & Organic Pigments

Industry Study with Forecasts for **2019 & 2024**

Study #3264 | April 2015 | $6300 | 385 pages

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Table of Contents

List of Tables/Charts

(continued on following page)

List of Tables/Charts

(continued from previous page)

WORLD DYE & ORGANIC PIGMENT OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

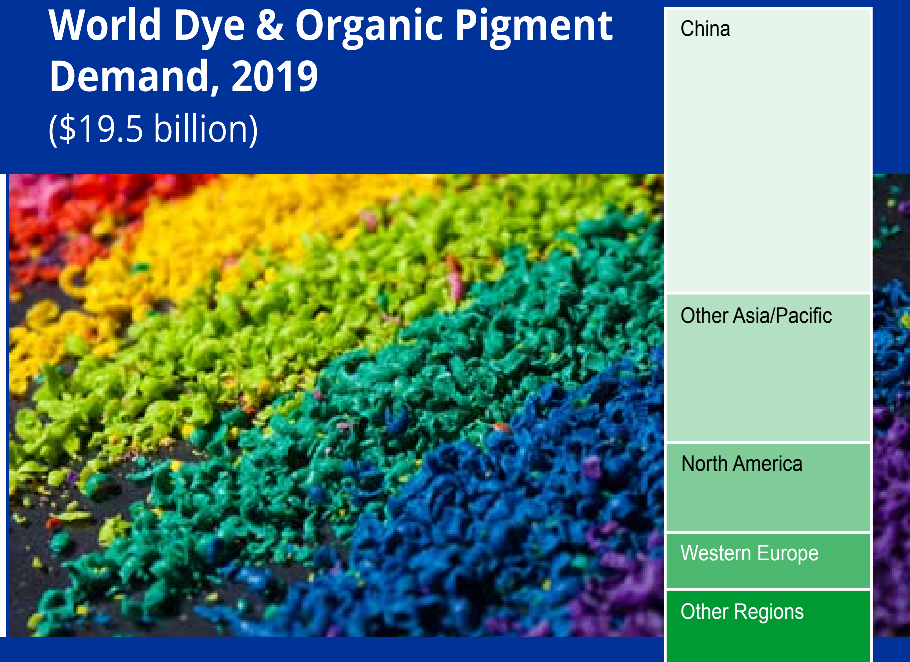
INDUSTRY STRUCTURE

Rising consumer spending will drive increased demand for organic colorants in textiles and plastics, while strong growth in global construction activity will boost demand in paints and coatings.

World demand to rise 6% annually through 2019

World demand for dyes and organic pigments is expected to grow 6.0 percent per year to $19.5 billion in 2019. Rising consumer spending will drive increased demand for organic colorants in textiles and plastics, while strong growth in global construction activity will boost demand in paints and coatings. Increases in value demand will reflect the growing importance of expensive, higher value dyes and pigments that meet increasingly stringent performance standards and preferences for more environmentally friendly products. Despite the healthy growth, even faster advances will be limited by a moderation in global vehicle production and slow growth in printing inks due to the challenges facing the print media industry.

World Dye & Organic Pigment Demand, 2019
($19.5 billion)



Growth in organic pigment demand to outpace dyes

Dyes will continue to represent the majority of the overall market in both volume and value. Disperse and reactive dyes account for over half of total world dye demand due to their popularity in the large textile market, where they are commonly used to color polyester and cotton, respectively. Organic pigment demand will outpace that for dyes through 2019, though from a lower base. Organic pigments are expected to outperform dyes due to increased usage of high performance pigments in paints and coatings and plastics applications. However, further growth will be limited by the rising costs associated with compliance with environmental regulations and the availability of raw materials.

Textiles, plastics to drive demand worldwide

Expansion of the middle class, particularly in the Asia/Pacific and Africa/Mideast regions, will help boost global consumer spending that will benefit important dye and organic pigment markets such as textiles and plastic products. Rising textile production -- the textile market accounted for over half of world dye and organic pigment demand in 2014 -- will be the primary contributor to increased demand going forward while growing plastic output will expand demand for organic pigments. Dye and organic pigment consumption will remain concentrated in the Asia/Pacific region, where the majority of world textile and consumer plastic product production occurs. While China will remain the dominant consumer globally of dyes and organic pigments, rapid growth will also be experienced in smaller Asian markets such as Bangladesh, India, and Vietnam as textile and plastic producers continue to move production to countries with the lowest labor costs. Additionally, consumer preferences for new, unusual textile colors that do not fade and yet are environmentally friendly will boost growth in value demand as textile producers increasingly turn to these newer, higher value products.

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Dye & Organic Pigment Demand

India is a fast-growing, developing market for dyes ments, with demand highly concentrated in the textile m India accounted for nine percent of total regional deman of total world demand in 2014.

Demand for dyes and organic pigments in India is f pand llion in 2019. In vol sump percent per year to tons. ving markets in the by c dyes, coupled with grow for use in printing and p ains a developing vast n ed in textile and fiber The nation also uses a higher than average amount of nat

SAMPLE TEXT

The country supports one of the world's largest cotton processing sectors, which generates substantial demand for various dyes, including reactive dyes, sulfur dyes, and direct dyes. In addition to its traditional strength in cotton, India has been investing heavily in its synthetic fiber industry, particularly polyester. This trend has greatly expanded the country's demand for disperse dyes, which are widely used in polyester processing.

Another major factor impacting Indian demand for dyes and organic pigments is the imposition and stricter enforcement of environmental and health regulations. These requirements are most difficult to meet for many older units in operation. Many of these plants lution control systems to meet new regulations, a requir often impractical for smaller producers. With respect to erations, the Indian government has also banned the use types of dyes that are thought to be potentially carcinog

196 Copyri

TABLE VI-6

INDIA: DYE & ORGANIC PIGMENT DEMAND
(million dollars)

Item	2004	2009	2014	2019	2024
Dyes & Organic Pigments (000 metric tons)					
$/kilogram					
Dye & Organic Pigment Demand					
By Type:					
Dyes					
Organic Pigments					
By Market:					
Textiles					
Printing Inks					
Plastics					
Paint & Coatings					
Other Markets					
% India					
Asia/Pacific Dyes & Organic Pigments					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD DYE & ORGANIC PIGMENT MARKET SHARE, 2014
($14.5 billion)

World Dyes & Organic Pigments

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Sample Profile & Table, & Study Coverage

TABLE III-3

WORLD DYE DEMAND BY TYPE
(million dollars)

Item	2004	2009	2014	2019	2024
World Mill Fiber Consump (000 metric tons)					
$ dyes/metric ton fiber					
World Dye Demand					
Disperse					
Reactive					
Acid					
Direct					
Basic					
Other					
% dyes					
World Dye & Organic Pigment Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

COMPANY PROFILES

Eksoy Chemical Industries Limited
Organize Sanayi Bölgesi
Gaziosman Paşa Mah Şehit Atilla Durmuş Sok. No:24
Çerkezköy 595
Turkey
90-282-726-71
http://www.eks

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

Eksoy Chemical manufactures a variety of textile chemicals, including surfactants, detergents, other auxiliaries and textile dyes. In addition to Turkey, the privately held company's textile chemicals are distributed primarily elsewhere in the Africa/Mideast, and Asia/Pacific regions, and Eastern Europe.

The Company participates in the world dyes and organic pigments industry via the production and sale of reactive and disperse textile dyes. Eksoy Chemical's reactive dyes include sulphone and mono-chlorotriazine/vinyl/sulphone types available in classic bifunctional, high-lightfastness, and other formulations. Other reactive dyes made by the Company include specialty black and neutral pH types. Eksoy Chemical also manufactures such dye auxiliaries as OPTIC optical brighteners, COLORFIX dye fixation agents, and EXOLINE soaping agents.

Eksoy Chemical's operations include two plants in Adana, Turkey that manufacture textile dyes and chemicals. One of the Adana plants was opened in 2014. This facility, which operates as Eksoy Technopark,

339

STUDY COVERAGE

This Freedonia study, ***World Dyes & Organic Pigments***, presents historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by type and market, in 6 regions and 19 countries. This study also considers key market environment factors, examines the industry structure, evaluates company market share and profiles 35 global industry players.

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Related Studies

Pharmaceutical Chemicals

This study analyzes the US pharmaceutical chemical industry. The study presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by type of API (active pharmaceutical ingredient) (e.g., central nervous system, cardiovascular, hormones, anti-infective, respiratory, gastrointestinal, biological, nutritional and herbal) and raw material (e.g., pharmaceutical intermediates, pharmaceutical solvents). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#3246..................June 2015.....................$5200

Waxes

This study analyzes the US wax industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., paraffin, microcrystalline waxes, polymer waxes, Fischer-Tropsch waxes, vegetable waxes, animal and insect waxes) and market (e.g., industrial, consumer and commercial). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3271.................. May 2015.....................$5200

World Flame Retardants

World flame retardant demand will rise 4.6 percent annually through 2018 to 2.8 million metric tons. China will be the fastest growing market and remain the largest, while North America will outpace developed regions. Alumina trihydrate will remain the dominant flame retardant, while phosphorus-based types will grow the fastest. This study analyzes the 2.2 million metric ton world flame retardant 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 players.

#3258............. February 2015.................$6300

Construction Chemicals

US demand for chemicals used in on-site construction will rise 8.2 percent annually through 2018 to $12.1 billion. Sprayed polyurethane foam, cement and asphalt additives, and grouts and mortars will grow the fastest. Higher value formulations will continue to gain market share in response to environmental and performance concerns. This study analyzes the $8.1 billion US construction chemical industry, with forecasts for 2018 and 2023 by product and application. The study also evaluates company market share and profiles industry players.

#3239...............January 2015..................$5200

Wood Protection Coatings & Preservatives

Demand for wood protection coatings and preservatives will rise 4.5 percent per year through 2018 to $4.8 billion. Gains will be driven by a rebound in residential construction. The dominant coatings segment will continue to outpace preservatives. Wood furniture applications will provide the best growth opportunities. This study analyzes the $3.9 billion US wood protection coatings and preservatives industry, with forecasts for 2018 and 2023 by product, application and market. The study also evaluates company market share and profiles industry players.

#3150..................June 2014.....................$5100

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