Waxes

US Industry Study with Forecasts for 2019 & 2024

Study #3271 | May 2015 | $5200 | 265 pages
# Waxes
## US Industry Study with Forecasts for 2019 & 2024

## Table of Contents

### INTRODUCTION

### EXECUTIVE SUMMARY

### MARKET ENVIRONMENT
- General................................................................. 4
- Macroeconomic Outlook ........................................ 4
- Consumer Income & Spending ................................. 9
- Manufacturing Outlook .......................................... 11
- Petroleum Industry Overview ................................ 15
- Historical Market Trends ...................................... 18
- Pricing Trends......................................................... 21
- Environmental & Regulatory Considerations ........... 23

### PRODUCT OVERVIEW
- Demand by Type...................................................... 26
- Foreign Trade ......................................................... 31
- Imports.................................................................. 32
- Exports................................................................ 36
- Production............................................................... 39

### PETROLEUM & MINERAL WAXES
- Types..................................................................... 41
- Paraffin Waxes....................................................... 43
- Refined.................................................................. 45
- Other.................................................................. 48
- Microcrystalline Waxes ......................................... 51
- Petrolatum............................................................. 53
- Other.................................................................. 55
- Other Mineral Waxes ............................................ 57
- Foreign Trade ......................................................... 60
- Imports.................................................................. 61
- Exports................................................................ 63
- Producers & Capacity ............................................ 64
- Market Share.......................................................... 66

### SYNTHETIC WAXES
- Types .................................................................. 68
- Polymer Waxes...................................................... 71
- Polyethylene......................................................... 72
- Other.................................................................. 75
- Fischer-Tropsch Waxes ......................................... 78
- Other Synthetic Waxes ......................................... 81
- Foreign Trade ......................................................... 84
- Imports.................................................................. 85
- Exports................................................................ 86
- Market Share.......................................................... 88

### NATURAL WAXES
- Types.................................................................. 91
- Vegetable Waxes................................................... 93
- Soy................................................................. 95
- Carnauba.............................................................. 97
- Other............................................................... 100
- Animal & Insect Waxes ......................................... 107
- Beeswax.............................................................. 108
- Lanolin............................................................... 110
- Other............................................................... 113
- Foreign Trade ......................................................... 115
- Imports................................................................ 117
- Exports................................................................ 118
- Market Share.......................................................... 119

### MARKETS
- General................................................................. 121
- Industrial................................................................ 122
- Plastic & Rubber....................................................... 124
- Plastic & Rubber Production Outlook ................... 125
- Wax Demand ......................................................... 127
- Adhesives............................................................... 129
- Adhesives & Sealants Industry Outlook ............... 130
- Wax Demand......................................................... 131
- Paper & Paperboard ............................................. 133
- Paper & Paperboard Production Outlook .......... 134
- Wax Demand......................................................... 136
- Building Boards..................................................... 141
- Building Board Industry Outlook......................... 141
- Wax Demand......................................................... 143
- Inks & Coatings .................................................... 145
- Inks & Coatings Production Outlook ................. 145
- Wax Demand......................................................... 147
- Other Industrial Markets ..................................... 150
- Consumer & Commercial .................................... 154
- Candles & Decorative Products ......................... 156
- Candle Production Outlook ................................ 157
- Wax Demand......................................................... 158
- Cosmetics & Toiletries ......................................... 160
- Cosmetics/Toiletries Industry Outlook............ 161
- Wax Demand......................................................... 164
- Firelogs............................................................... 167
- Firelog Industry Outlook ................................ 167
- Wax Demand......................................................... 169
- Household & Automotive Polishes .................... 171
- Household & Automotive Polish Industry Outlook 171
- Wax Demand......................................................... 172
- Pharmaceuticals ................................................... 174
- Pharmaceutical Industry Outlook................. 175
- Wax Demand......................................................... 178

### INDUSTRY STRUCTURE
- General................................................................. 185
- Market Share........................................................ 187
- Industry Restructuring ......................................... 191
- Competitive Strategies ........................................ 193
- Manufacturing...................................................... 196
- Marketing & Distribution ..................................... 198

### COMPANY PROFILES
- Altana AG .......................................................... 201
- Alzchem GmbH...................................................... 202
- American Refining............................................... 205
- Archer-Daniels-Midland .................................... 206
- Armored AutoGroup .......................................... 207
- Baker Hughes....................................................... 208
- BASF SE.............................................................. 210
- Berkshire Hathaway .......................................... 212
- Bunge Limited....................................................... 214
- Calumet Specialty Products ......................... 215
- Clariant International .......................................... 217
- Clorox Company ................................................ 219
- Croda International ............................................. 220
- Dow Corning........................................................ 222
- Elementis plc....................................................... 223
- Elevance Renewable Sciences ...................... 225
- Ergon Incorporated ............................................. 226
- Evonik Industries................................................ 227
- Ergon Mobil ........................................................ 229
- Genesee Polymers ................................................. 231
- Hexion Incorporates ............................................ 232
- HollyFrontier Corporation ................................... 233
- Honeywell International ..................................... 235
- International Group .............................................. 236
- Koster Keuen ........................................................ 238
- Marcus Oil & Chemical ........................................ 240
- Michelman Incorporated ...................................... 241
- Micro Powders ..................................................... 243
- Momentive Performance Materials ............... 245
- Multiceras SA ....................................................... 246
- Pilot Travel Centers ............................................. 248
- RITA Corporation................................................ 249
- Ross (Frank B.) Company .................................. 250
- Royal Dutch Shell ................................................ 252
- Sasol NA ............................................................... 253
- Solvay SA .............................................................. 257
- Sonneborn LLC .................................................... 256
- Strahl & Pitts ......................................................... 257
- Vantage Specialty Chemicals ......................... 259
- Westlake Chemical .............................................. 261
- Other Firms Mentioned in the Study ................. 263-265

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## List of Tables

### EXECUTIVE SUMMARY
1. Summary Table ............................................. 3

### MARKET ENVIRONMENT
1. Macroeconomic Indicators ............................. 8
2. Personal Consumption Expenditures ............. 11
3. Manufacturers’ Shipments ............................ 15
4. Crude Oil & Refined Petroleum
   Products Supply & Demand .......................... 18
5. Wax Demand, 2004-2014 .............................. 20
6. Wax Prices .................................................... 23

### PRODUCT OVERVIEW
1. Wax Demand by Type ....................................... 29
2. Foreign Trade in Waxes ................................. 32
3. Wax Imports by Type & Source, 2009-2014 ....... 34
4. Wax Exports by Type & Destination, 2009-2014 .. 37
5. Wax Production by Type ................................. 40

### PETROLEUM & MINERAL WAXES
1. Petroleum & Mineral Wax Demand by Type ....... 42
2. Paraffin Wax Demand ................................. 45
3. Refined Paraffin Wax Demand ....................... 48
4. Other Paraffin Wax Demand ......................... 50
5. Microcrystalline Wax Demand ....................... 53
6. Petrolatum Demand .................................... 55
7. Other Microcrystalline Wax Demand ............... 57
8. Montan & Other Mineral Wax Demand .......... 60
11. Petroleum & Mineral Wax Exports by Destination, 2009-2014 ... 63

### SYNTHETIC WAXES
1. Synthetic Wax Demand .................................. 70
2. Polymer Wax Demand .................................. 72
3. Polyethylene Wax Demand ......................... 75
4. Other Polymer Wax Demand ....................... 78
5. Fischer-Tropsch Wax Demand ..................... 81
6. Other Synthetic Wax Demand ...................... 83
7. Foreign Trade in Synthetic Waxes ............... 84
8. Synthetic Wax Imports by Source, 2009-2014 ... 86
9. Synthetic Wax Exports by Destination, 2009-2014 .... 87

### NATURAL WAXES
1. Natural Wax Demand ........................................... 92
2. Vegetable Wax Demand .................................. 95
3. Soy Wax Demand .......................................... 97
4. Carnauba Wax Demand .......................... 100
5. Other Vegetable Wax Demand .................... 101
6. Animal & Insect Wax Demand .................. 108
7. Beeswax Demand ........................................ 110
8. Lanolin Demand .......................................... 113
9. Other Animal & Insect Wax Demand .......... 115
10. Foreign Trade in Natural Waxes ............... 116
11. Natural Wax Imports by Source, 2009-2014 .... 118
12. Natural Wax Exports by Destination, 2009-2014 .... 119

### MARKETS
1. Wax Demand by Market .................................. 122
2. Industrial Wax Market .................................. 124
3. Plastic Resin & Rubber Production ............ 127
4. Plastics & Rubber Market for Waxes ......... 129
5. Adhesives & Sealants Shipments ............... 131
6. Adhesive Market for Waxes ....................... 133
7. Paper & Paperboard Supply & Demand ......... 136
9. Reconstituted Wood Product Shipments .......... 143
10. Building Board Market for Waxes .......... 144
11. Inks & Coatings Production ....................... 147
13. Other Industrial Markets for Waxes .......... 154
14. Consumer & Commercial Markets for Waxes ... 156
15. Candle Shipments ..................................... 158
17. Cosmetic & Toiletry Supply & Demand .......... 164
18. Cosmetic & Toiletry Market for Waxes ..... 167
19. Firelog Supply & Demand ......................... 169
20. Firelog Market for Waxes .......................... 170
21. Polish Shipments ..................................... 172

### INDUSTRY STRUCTURE
1. US Wax Sales by Company, 2014 .......... 186
2. Selected Acquisitions & Divestitures ........ 193
3. Selected Cooperative Agreements ........... 195

## List of Charts

### MARKET ENVIRONMENT
1. Wax Demand, 2004-2014 ......................... 21

### PRODUCT OVERVIEW
1. Wax Demand by Type, 2014: Volume & Value .......... 30
2. Wax Imports by Type & Source, 2014 .......... 35
3. Wax Exports by Type & Destination, 2014 .......... 38

### PETROLEUM & MINERAL WAXES
1. Petroleum & Mineral Wax Demand by Type, 2014 .. 43

### SYNTHETIC WAXES
1. Synthetic Wax Demand by Type, 2014 ........ 71
2. Synthetic Wax Market Share, 2014 ........ 90

### NATURAL WAXES
1. Natural Wax Demand, 2004-2024 ............ 93

### INDUSTRY STRUCTURE
1. Wax Market Share by Company, 2014 ...... 188
Volume increases will be based on continued growth in manufacturing and residential construction, while weakness in the packaging industry and most consumer and commercial applications will limit gains.

US demand to rise 1.8% annually through 2019

US demand for waxes is forecast to grow 1.8 percent annually through 2019 to nearly three billion pounds, with value demand reaching $3.2 billion. Increases in volume terms will be supported by continued growth in manufacturing and residential construction activity. However, advances will be limited by a challenging environment for waxes in the packaging industry, as well as weak growth in most consumer and commercial applications. The supply and market share of different wax types will remain dynamic as changes in the global petroleum refining industry impact the supply and pricing of petroleum derived waxes, as crude oil and natural gas prices impact synthetic wax capacity, and as agricultural commodity prices impact production of natural waxes.

Industrial applications to be fastest growing market

Continued strengthening of the economy will support growth in the US manufacturing sector, which in turn will continue to drive industrial wax demand, particularly in coatings and inks, adhesives, and plastic and rubber processing. While these applications typically employ the most cost-effective waxes, demand is expected to grow for waxes that increase production efficiency and lower input costs. The fastest increases in wax demand will be in the manufacture of building boards, spurred on by robust increases in residential construction activity. In contrast, rising interest in sustainability and demand for recyclable alternatives will reduce the use of waxes in paper and paperboard packaging. Growth in industrial wax demand will be healthy going forward, while the outlook for consumer and commercial wax consumption will not be as strong, restrained by the general maturity of these wax applications. Long term trends away from the use of polish on automobiles and flooring will further limit growth.

Wax supply, market share to remain dynamic

Petroleum waxes are expected to face supply issues as major refiners shift away from producing the lower quality base oils from which petroleum waxes are derived. Additionally, refiners are increasingly turning to catalytic dewaxing technologies, which do not produce wax as a byproduct. Limited supplies will continue to raise petroleum wax prices, benefiting synthetic and natural wax alternatives. The use of synthetic waxes as additives to create high-performance, low-cost wax blends is expected to be a major area of focus for product development. While synthetic waxes will generally benefit from the shift toward higher quality base oils by refiners, synthetic Fisher-Tropsch waxes will face their own supply shortages due to the delay or cancellation of new gas-to-liquids (GTL) projects in the US following the collapse of crude oil prices in 2014.
MARKETS

**Adhesives & Sealants Industry Outlook** -- US shipments of adhesives and sealants are forecast to annually grow through 2019 by 5.1 percent to $14.5 billion, supported by continued growth in construction markets that are combined with rising demand for adhesives and sealants in manufacturing and assembly. A rebound in construction spending and the expansion of manufacturing and assembly markets are expected to support growth. Adhesives and sealants technologically displace mechanical fasteners in applications traditionally dominated by metals and other alternative joining systems, especially in high volume products such as motor vehicles, aircraft, and electronics. However, advances will be limited by trends toward high solids formulations and lower application weights, which will restrict the total volume of adhesives and sealants consumed. Market maturity and sluggish growth in paper packaging and other key markets will further restrain increases.

The fastest annual growth through 2019 is expected for reactive adhesives and sealants, driven by rising demand in major markets (e.g., manufacturing and assembly, construction) and trends favoring higher value materials. Silicone and polyurethane adhesives and sealants will post the most rapid gains among reactive types, supported by their superior performance characteristics. Hot-melt products will register near average advances, as their rapid cure rates continue to promote their use in markets such as packaging that requires fast processing speeds. In addition, hot-melt adhesives’ lack of volatile organic compound (VOC) emissions will continue to benefit demand.

Manufacturing and assembly will continue to be the largest market for adhesives and sealants. Within this market, the tapes and labels segment is expected to remain the leading outlet for adhesives, supported by healthy advances in the production of pressure sensitive tapes. Among other segments, solid increases are expected in the aerospace, machinery, motor vehicle, and electrical and electronic markets. Adhesives and sealants will continue to displace alternative fastening systems, driven by their ease of application and superior performance characteristics.

### TABLE IV-3

**REFINED PARAFFIN WAX DEMAND BY MARKET**

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nondurable Goods Shipments (bil 2009$) lb paraffin/000$ nondurables</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refined Paraffin Demand (mil lb) $/lb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paper &amp; Paperboard</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Candles &amp; Decoratives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plastics &amp; Rubber</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Markets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Refined Paraffin Wax Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.

### CHART VIII-1

**WAX MARKET SHARE BY COMPANY, 2014**

($2.4 billion)

- Other: 66.8%
- Exxon Mobil: 11.6%
- Home: 7.9%
- Calumet IG: 7.5%
- Motiva: 6.2%
Sample Profile & Table, & Study Coverage

COMPANY PROFILES

Armored AutoGroup Incorporated
44 Old Ridgebury Road, Suite 300
Danbury, CT  06810
203-205-2900
http://www.armoredautogroup.com

Sales:  $298 million (2014, as reported to the SEC)
US Sales:  $201 million (2014, as reported to the SEC)
Employment:  270 (2014, as reported to the SEC)
Key Products:  wax-based automotive appearance products

Armored AutoGroup manufactures automotive aftermarket appearance products and performance chemicals under the ARMOR ALL and STP brand names. The Company operates in two segments: North America and International. Armored AutoGroup is 91.3-percent owned by Avista Capital Partners (New York, New York).

The Company participates in the US waxes industry through the North America segment, which had 2014 sales of $220 million. The segment includes automotive care products marketed and sold in the US and Canada under the ARMOR ALL and STP brand names. Among the North America segment’s ARMOR ALL products are EXTREME SHIELD WAX, PREMIUM WASH & WAX + PROTECT, and ULTRA SHINE WASH & WAX wax-based automotive appearance products.

EXTREME SHIELD WAX polymer-based wax is formulated to protect automotive exteriors and repel dirt and grime. The Company’s PREMIUM WASH & WAX + PROTECT wash/wax product incorporates carnauba wax and a pearlescent polymer that is intended to minimize water on a vehicle after rinsing. ULTRA SHINE WASH & WAX wash/wax product is based on carnauba wax and features cleaning

TABLE V-2
POLYMER WAX DEMAND
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nondurable Goods Shipments (bil 2009$)</td>
<td>2388</td>
<td>2227</td>
<td>2390</td>
<td>2550</td>
<td>2690</td>
</tr>
<tr>
<td>lb wax/000$ nondurables</td>
<td>0.14</td>
<td>0.15</td>
<td>0.17</td>
<td>0.19</td>
<td>0.21</td>
</tr>
<tr>
<td>Polymer Wax Demand (mil lb) $/lb</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polymer Wax Demand</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Polyethylene</td>
<td>168</td>
<td>190</td>
<td>307</td>
<td>430</td>
<td>580</td>
</tr>
<tr>
<td>Other Polymer Waxes</td>
<td>157</td>
<td>182</td>
<td>298</td>
<td>413</td>
<td>555</td>
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<tr>
<td>% polymer</td>
<td>68.4</td>
<td>66.5</td>
<td>74.7</td>
<td>74.6</td>
<td>75.7</td>
</tr>
<tr>
<td>Synthetic Wax Demand</td>
<td>475</td>
<td>559</td>
<td>810</td>
<td>1130</td>
<td>1500</td>
</tr>
</tbody>
</table>

Source: The Freedonia Group, Inc.

This Freedonia study, *Waxes*, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by type (petroleum & mineral, natural, synthetic) and market. The study also considers key market environment factors, examines the industry structure, evaluates company market share and profiles 39 US industry competitors.
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Page 7
Related Studies

**Amines**
This study analyzes the US amines industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., ethanolamines, alkylamines, fatty amines, specialty amines, ethyleneamines, polyetheramines) and market (e.g., cleaning products, agricultural chemicals, personal care products, natural gas processing, water treatment, lubricants, wood treatment). The study also considers market environment factors, details industry structure, evaluates company market share and capacity share, and profiles industry players.

#3292 ............... July 2015 .......... ........................ $5200

**Adhesives & Sealants**
US demand for adhesives and sealants is forecast to increase 2.8 percent per year to 6.4 billion pounds in 2019, valued at $12.8 billion. Reactive adhesives and sealants will be the fastest growing types. The construction market will lead gains, while the manufacturing and assembly market will remain the largest segment. This study analyzes the 5.6 billion pound US adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3257 ............. February 2015 .......... ........................ $5400

**Surfactants**
US demand for surfactants will rise 3.2 percent per year to 10.9 billion pounds in 2018, valued at $14.4 billion. Industrial markets will grow the fastest, benefiting specialty surfactants the most. Personal care products will also offer good market opportunities, led by surfactants that are gentle on skin and hair and are environmentally sustainable. This study analyzes the 9.3 billion pound US surfactants industry, with forecasts for 2018 and 2023 by market and product. The study also evaluates company market share and profiles industry participants.

#3247 ............. January 2015 .......... ........................ $5200

**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 participants.

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

**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

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