



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 2](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Study Coverage 6](#)

[Order Form & Corporate Use License 7](#)

[About Freedonia, Custom Research, Related Studies 8](#)

World Silicones

Industry Study with Forecasts for 2019 & 2024

Study #3277 | May 2015 | \$6400 | 313 pages

www.freedoniagroup.com



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
Email: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General.....	4
Global Economic Overview.....	5
Recent Historical Trends.....	5
World Economic Outlook.....	6
World Population Outlook.....	9
World Construction Outlook.....	11
World Manufacturing Overview.....	14
World Chemicals Outlook.....	17
World Motor Vehicle Production Outlook.....	19
World Healthcare Overview.....	22
Technology.....	25
Basic Silicone Synthesis.....	26
Siloxane.....	26
Silicone Products.....	28
Environmental & Regulatory Overview.....	31

OVERVIEW

General.....	34
Demand by Region.....	35
Demand by Market.....	38
Electrical & Electronic.....	41
Construction.....	44
Transportation.....	47
Health & Personal Care.....	51
Chemical.....	56
Other Markets.....	58
Demand by Product.....	62
Elastomers.....	64
Fluids.....	67
Resins.....	71
Gels & Other.....	74
Production & Trade.....	78

NORTH AMERICA

Economic Overview.....	80
Silicone Demand.....	82
United States.....	85
Canada.....	92
Mexico.....	97

WESTERN EUROPE

Economic Overview.....	103
Silicone Demand.....	105
Germany.....	108
France.....	114

Italy.....	119
United Kingdom.....	124
Spain.....	129
Other Western Europe.....	134

ASIA/PACIFIC

Economic Overview.....	141
Silicone Demand.....	143
China.....	146
Japan.....	153
South Korea.....	159
India.....	164
Taiwan.....	169
Other Asia/Pacific.....	174

OTHER REGIONS

Central & South America.....	182
Economic Overview.....	182
Silicone Demand.....	184
Brazil.....	186
Other Central & South America.....	191
Eastern Europe.....	195
Economic Overview.....	195
Silicone Demand.....	197
Russia.....	199
Other Eastern Europe.....	204
Africa/Mideast.....	209
Economic Overview.....	209
Silicone Demand.....	211

INDUSTRY STRUCTURE

General.....	215
Market Share.....	217
Acquisitions & Divestitures.....	222
Marketing Strategies.....	225
Channels of Distribution.....	225
Technology & Manufacturing.....	227
Research & Development.....	228
Cooperative Agreements.....	229

COMPANY PROFILES

Actavis plc.....	235
Arkema SA.....	238
Ashland Incorporated.....	240
Berkshire Hathaway.....	242
Caledonia Investments.....	244
China National Bluestar Group.....	245
Clariant International.....	250
CRI-SIL Silicone Technologies.....	251
CSL Silicones.....	252

Dongyue Group.....	254
Dow Corning.....	255
Emerald Performance Materials.....	260
Evonik Industries.....	262
Gelest Incorporated.....	266
Handy & Harman.....	268
Henkel AG.....	269
ICM Products.....	272
Jiangsu Hongda New Material Company.....	275
Johnson & Johnson.....	276
Kaneka Corporation.....	278
KCC Corporation.....	279
Kemira Oyj.....	282
Milliken & Company.....	284
Momentive Performance Materials.....	286
NuSil Technology.....	290
Provista SA.....	292
Rogers Corporation.....	293
Shin-Etsu Chemical.....	296
Silchem Incorporated.....	300
Silteq Limited.....	302
Specialty Silicone Products.....	303
Total SA.....	305
Wacker Chemie.....	307
Zhejiang Xinan Chemical Industrial Group.....	312

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 World Gross Domestic Product by Region.....	9
2 World Population by Region.....	11
3 World Construction Expenditures by Region.....	14
4 World Manufacturing Value Added by Region.....	17
5 World Chemical Manufacturing Value Added by Region.....	19
6 World Motor Vehicle Production.....	22
7 World Healthcare Expenditures.....	25
Cht World Siloxane Production, 2014.....	28

OVERVIEW

1 World Silicone Demand by Region.....	37
(continued on following page)	

List of Tables/Charts

(continued from page 2)

Cht World Silicone Demand by Region, 2004-2024	38
2 World Silicone Demand by Market	40
Cht World Silicone Demand by Market, 2014.....	41
3 World Electrical & Electronic Markets for Silicones	44
4 World Construction Markets for Silicones	47
5 World Transportation Markets for Silicones	51
6 World Health & Personal Care Markets for Silicones	55
7 World Chemical Markets for Silicones..	58
8 Other World Markets for Silicones	62
9 World Silicone Demand by Product.....	63
Cht World Silicone Demand by Product, 2014	64
10 World Silicone Elastomer Demand by Region & Market	67
11 World Silicone Fluid Demand by Region & Market	71
12 World Silicone Resin Demand by Region & Market	74
13 World Silicone Gel & Other Silicone Demand by Region & Market	77

NORTH AMERICA

1 North America: Key Indicators for Silicone Demand	82
2 North America: Silicone Demand by Market & Product.....	84
Cht North America: Silicone Demand by Country, 2014.....	85
3 United States: Key Indicators for Silicone Demand	87
4 United States: Silicone Demand by Market & Product.....	90
5 Canada: Key Indicators for Silicone Demand	93
6 Canada: Silicone Demand by Market & Product.....	96
7 Mexico: Key Indicators for Silicone Demand	99
8 Mexico: Silicone Demand by Market & Product.....	101

WESTERN EUROPE

1 Western Europe: Key Indicators for Silicone Demand	105
2 Western Europe: Silicone Demand by Market & Product.....	107
Cht Western Europe: Silicone Demand by Country, 2014.....	108
3 Germany: Key Indicators for Silicone Demand	110
4 Germany: Silicone Demand by Market & Product.....	112
5 France: Key Indicators for Silicone Demand	116
6 France: Silicone Demand by Market & Product.....	118
7 Italy: Key Indicators for Silicone Demand	121
8 Italy: Silicone Demand by Market & Product.....	123
9 United Kingdom: Key Indicators for Silicone Demand	126
10 United Kingdom: Silicone Demand by Market & Product.....	128
11 Spain: Key Indicators for Silicone Demand	131
12 Spain: Silicone Demand by Market & Product.....	133
13 Other Western Europe: Key Indicators for Silicone Demand	136
14 Other Western Europe: Silicone Demand by Market & Product.....	138
15 Other Western Europe: Silicone Demand by Country	140

ASIA/PACIFIC

1 Asia/Pacific: Key Indicators for Silicone Demand	143
2 Asia/Pacific: Silicone Demand by Market & Product.....	145
Cht Asia/Pacific: Silicone Demand by Country, 2014.....	146
3 China: Key Indicators for Silicone Demand	148
4 China: Silicone Demand by Market & Product.....	151
5 Japan: Key Indicators for Silicone Demand	155
6 Japan: Silicone Demand by Market & Product.....	158
7 South Korea: Key Indicators for Silicone Demand	161
8 South Korea: Silicone Demand by Market & Product.....	163

9 India: Key Indicators for Silicone Demand	166
10 India: Silicone Demand by Market & Product.....	168
11 Taiwan: Key Indicators for Silicone Demand	171
12 Taiwan: Silicone Demand by Market & Product.....	173
13 Other Asia/Pacific: Key Indicators for Silicone Demand	176
14 Other Asia/Pacific: Silicone Demand by Market & Product.....	178
15 Other Asia/Pacific: Silicone Demand by Country	180

OTHER REGIONS

1 Central & South America: Key Indicators for Silicone Demand	184
2 Central & South America: Silicone Demand by Market & Product.....	185
3 Brazil: Key Indicators for Silicone Demand	188
4 Brazil: Silicone Demand by Market & Product.....	190
5 Other Central & South America: Key Indicators for Silicone Demand.....	192
6 Other Central & South America: Silicone Demand by Market & Product.....	194
7 Eastern Europe: Key Indicators for Silicone Demand	197
8 Eastern Europe: Silicone Demand by Market & Product.....	199
9 Russia: Key Indicators for Silicone Demand	201
10 Russia: Silicone Demand by Market & Product.....	203
11 Other Eastern Europe: Key Indicators for Silicone Demand	206
12 Other Eastern Europe: Silicone Demand by Market & Product.....	208
13 Africa/Mideast: Key Indicators for Silicone Demand	211
14 Africa/Mideast: Silicone Demand by Market & Product.....	213

INDUSTRY STRUCTURE

1 World Silicone Sales by Company, 2014	217
Cht World Silicone Market Share, 2014.....	218
2 Selected Acquisitions & Divestitures	224
3 Selected Cooperative Agreements	231

While the heightened growth of the rebound period after 2009 will not continue, there will be strong demand gains in developing regions based on increased penetration of silicones in less mature markets.

World demand to rise 5.7% annually through 2019

World demand for silicones is forecast to rise 5.7 percent per year to \$19.3 billion in 2019. The pace of growth in value terms will be in line with that seen over the 2009-2014 period, largely due to an improved outlook for silicone prices. However, gains in volume demand will slow somewhat. Growth in global silicone consumption over the 2009-2014 period was bolstered by recovery from the effects of the 2009 recession, and the heightened growth of this rebound period will not continue into the coming years. Nevertheless, demand for silicones in developing regions is still expected to post strong gains through 2019, benefiting from economic advancement and increased penetration of silicones in less mature markets.

Asia/Pacific region to claim most new demand

The Asia/Pacific region will continue to be the strongest source of additional silicone demand, accounting for 57 percent of the total increase in global silicone consumption between 2014 and 2019. The bulk of these gains will be attributable to China, which will represent nearly three-fifths of the Asia/Pacific total in 2019. Although China's silicone market will not maintain the extremely rapid pace of gains seen in recent years, growth will still continue to be well in excess of the global average. Other developing countries in the Asia/Pacific region, such as India, Indonesia, and

World Silicone Demand, 2019 (\$19.3 billion)



Asia/Pacific

North America

Western Europe

Other Regions

Thailand, are also expected to post strong gains in silicone demand, but the overall pace of growth will be limited by a below average performance in Japan, which will remain the second largest silicone market in the region. Electrical and electronic products will remain the largest outlet for silicones in the Asia/Pacific region, reflecting the region's dominance in electronics manufacturing.

Demand in other regions to advance more slowly

The outlook for silicone demand in North America and Western Europe is somewhat weaker, reflecting the maturity of both manufacturing industries in general and the use of silicones. In the US

market, the largest in the world, demand for silicones will be bolstered by a major improvement in construction activity. Demand for silicones in Western Europe will advance slowly, although the region's affluence will continue to support significant demand for silicones in the health and personal care market. Above average growth is expected in the Africa/Mideast region, aided by urbanization and the emergence of the middle class in some of the more developed nations. Gains in silicone demand in Central and South America will be near the world average, benefiting from a rebound in motor vehicle production. Gains in Eastern Europe are expected to be slightly below the world average, but will still represent a healthy increase.

Copyright 2015 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

ASIA/PACIFIC

South Korea: Markets & Products

Demand for silicones in South Korea is projected to advance at a rate of 3.5 percent per year to \$1.2 billion in 2019, which will trail the average but will be close to the 2009-2014 average. Growth in demand for silicones in South Korea in 2019 will be similar to that seen during the 2009-2014 period, reflecting manufacturing output in the country was not seriously affected by the global economic downturn of 2009. South Korea is expected to continue its intensive consumption of silicones, ranking first in the Asia/Pacific region and fourth in the world per capita in 2014.

South Korea is home to a number of silicone-consuming manufacturing industries, with the electronic products industry in particular providing a major source of demand. The electrical and electronic products accounted for 35 percent of silicone demand in South Korea in 2014, a larger share than in any other major country except Taiwan. Demand for electronic products manufacturing is expected to continue to rise through 2019, supporting healthy growth in silicone demand. Transportation is the second largest market for silicones in the country, but gains in this market are expected to trail the average, reflecting sluggish growth in motor vehicle output. The construction market is also expected to post below average growth, although gains here will be an improvement on those seen over the 2009-2014 period, when construction spending contracted. The health and personal care market will post the fastest growth, as both health spending and personal care product shipments will continue to rise at a strong pace through 2019. Manufacturing of chemicals is expected to grow at about the same rate as manufacturing output in general, supporting solid growth for silicones in the chemicals market.

Silicone elastomers and fluids combined to account for 19.4 percent of demand in South Korea in 2014. Demand for both products is expected to advance at rates near the average, reflecting the solid growth expected for silicones in the Asia/Pacific region.

162

Copyright 2015

SAMPLE
TEXT

TABLE VI-8

SOUTH KOREA: SILICONE DEMAND BY MARKET & PRODUCT
(million dollars)

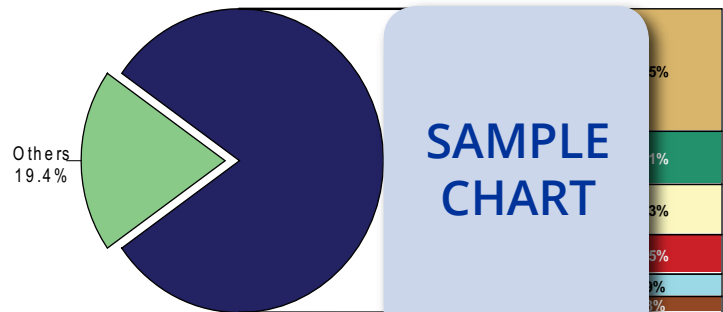
Item	2004	2009	2014	2019	2024
Manufacturing Value Added (bil 2013\$)					
\$ silicones/000\$ MVA					
Silicone Demand					
By Market:					
Electrical & Electronic					
Construction					
Health & Personal Care					
Transportation					
Chemical					
Other Markets					
By Product:					
Elastomers					
Fluids					
Resins					
Gels & Other Products					
% South Korea					
Asia/Pacific Silicone Demand					

SAMPLE
TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD SILICONE MARKET SHARE, 2014
(\$14.6 billion)



SAMPLE
CHART

Sample Profile & Table, & Study Coverage

TABLE VI-7
SOUTH KOREA:
KEY INDICATORS FOR SILICONE DEMAND

Item	2004	2009	2014	2019	2024
Population (million)					
GDP/capita					
Gross Domestic Product (bil 2013\$)					
Manufacturing Value Added (bil 2013\$)					
Construction Expenditures (bil 2013\$)					
Health Expenditures (bil \$)					
Chemical Mfg Value Added (bil 2013\$)					
Motor Vehicle Production (000 units)					
\$ silicones/capita					
\$ silicones/mil \$ GDP					
Silicone Demand (mil \$)					

Source: The Freedonia Group, Inc.



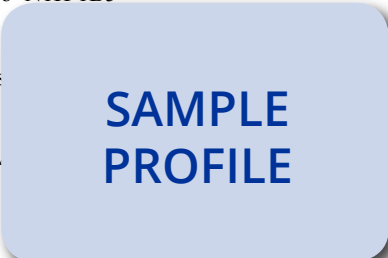
COMPANY PROFILES

CSL Silicones Incorporated

144 Woodlawn Road West
 Guelph, Ontario N1H 1B5
 Canada
 519-836-9044
<http://www.csls.com>

Annual Sales:
 Employment:

Key Products:



CSL Silicones is a manufacturer of room temperature vulcanizing (RTV) silicone products. The privately held company's operations are in Guelph, Ontario, Canada.

The Company is active in the world silicone industry through the manufacture of RTV silicone products, which are intended for use in the building, construction, electronics, electrical, manufacturing, industrial, transportation, energy, and infrastructure markets. CSL Silicones' products consist of SI-COAT silicone coatings and CSL silicone sealants.

The SI-COAT range includes anti-graffiti, anti-corrosion, and high-voltage insulator coatings. Anti-graffiti coatings include SI-COAT 529, a pigmented coating suitable for use over metal, concrete, brick, stone, wood, fiberglass, and pre-existing coatings. One representative anti-corrosion coating is SI-COAT 579, which is used in above-grade applications in both new and retrofit locations. High-voltage insulator coatings are formulated to provide extended-term flashover protection in adverse conditions.

STUDY COVERAGE

This Freedonia study, *World Silicones*, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product and market in 6 regions and 15 countries. The study also considers market environment factors, examines the industry structure, evaluates company market share data and profiles 34 global industry competitors.

Related Studies

Fluoropolymers

This study analyzes the US fluoropolymer industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., PTFE, fluoroelastomers, FEP, PVDF, PVF), application (e.g., coatings and liners, mechanical parts, films) and market (e.g., industrial processing, electrical and electronic, transportation equipment, construction). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players. **#3278.....June 2015.....\$5300**

Engineering Plastics

Demand for engineering plastics in the US is expected to rise 2.6 percent per year to 5.1 billion pounds in 2019. Nylon, ABS, and polycarbonate will remain the three largest engineering plastics by volume, with nylon the fastest growing of the three. Smaller-volume engineering plastics such as polyphenylene sulfide, sulfone polymers, and fluoropolymers will grow the fastest. This study analyzes the 4.5 billion pound US engineering plastic industry, with forecasts for 2019 and 2024 by resin and market. The study also evaluates company market share and profiles industry players. **#3242.....April 2015.....\$5300**

World Emulsion Polymers

Global demand for emulsion polymers will rise 4.6 percent annually to 12.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest-growing market. The paint and coatings segment will remain the largest and fastest-growing application, followed by adhesives in size and growth rate. This study analyzes the 10 million metric ton world emulsion polymer industry, with forecasts for 2018 and 2023 by market, polymer, world region, and for 16 countries. The study also evaluates company market share and profiles industry participants. **#3216.....October 2014.....\$6200**

World Polyethylene

Global polyethylene demand will rise 4.0 percent yearly to 99.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest growing market, driven by China. Following a decade of decline, North America will add nine million tons of production capacity through 2023. This study analyzes the 82 million metric ton world polyethylene industry, with capacity, production and demand forecasts for 2018 and 2023 by product, market, world region, and for 27 countries. The study also evaluates company market share and profiles industry players. **#3210.....October 2014.....\$6200**

Silicones

US demand for silicones is forecast to climb 4.7 percent annually to \$4.3 billion in 2018, with volume rising 3.2 percent per year to 900 million pounds. Silicone elastomers will grow the fastest, overtaking fluids as the leading product type. The construction and medical markets will be the fastest growing segments, while the industrial market will remain dominant. This study analyzes the \$3.4 billion US silicones industry, with forecasts for 2018 and 2023 by product, market and application. It also evaluates company market share and profiles industry players. **#3138.....March 2014.....\$5100**

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

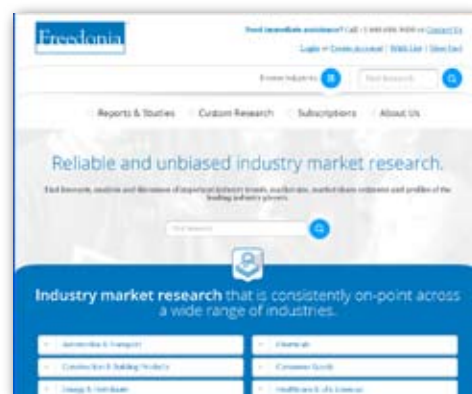
Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](#)