Amines

US Industry Study with Forecasts for 2019 & 2024

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# Table of Contents

**EXECUTIVE SUMMARY**

**MARKET ENVIRONMENT**

General .............................................. 4  
Macroeconomic Outlook ......................... 5  
Demographic Outlook ............................ 9  
Consumer Spending Outlook .................. 13  
Manufacturing Outlook ......................... 16  
Historical Market Trends ...................... 20  
Pricing Patterns .................................... 23  
Environmental & Regulatory  
Considerations .................................... 25  
International Activity .......................... 27  
Foreign Trade ..................................... 28  
Exports ............................................ 29  
Imports .......................................... 31  

**PRODUCTS**

General ............................................. 34  
Ethanolamines ...................................... 38  
Supply & Demand .................................. 38  
Types ................................................ 40  
Diethanolamine ................................. 42  
Monoethanolamine ............................ 44  
Triethanolamine ................................ 47  
Producers & Capacity ............................ 49  
Alkylamines ....................................... 52  
Supply & Demand ................................. 52  
Types ................................................ 54  
Methylamines ..................................... 55  
Dimethylamine .................................... 58  
Monomethylamine .............................. 60  
Trimethylamine .................................. 62  
Other Alkylamines .............................. 64  
Producers & Capacity ............................ 66  
Fatty Amines ...................................... 68  
Supply & Demand ................................. 69  
Types & Markets .................................. 70  
Producers .......................................... 71  

Specialty Amines ................................. 73  
Supply & Demand .................................. 73  
Types ................................................ 75  
Markets ............................................. 76  
Producers .......................................... 78  
Ethyleneamines .................................... 80  
Supply & Demand .................................. 80  
Types ................................................ 82  
Ethyleneimine .................................... 84  
Diethyleneimine ................................. 86  
Other Ethyleneamines .......................... 88  
Producers & Capacity ............................ 90  
Polyetheramines .................................. 91  
Supply & Demand .................................. 92  
Types ................................................ 93  
Producers .......................................... 95  

**MARKETS**

General ............................................. 96  
Agricultural Chemicals ....................... 99  
Supply & Demand ................................. 100  
Amines Demand ................................... 101  
Cleaning Products ............................... 104  
Supply & Demand ................................. 104  
Amines Demand ................................... 106  
Personal Care Products ......................... 108  
Supply & Demand ................................. 109  
Ammonia Demand ................................ 111  
Water Treatment .................................. 113  
Water Withdrawal & Usage Outlook ........ 114  
Ammonia Demand ................................ 117  
Natural Gas Processing ......................... 118  
Natural Gas Outlook ............................ 119  
Ammonia Demand ................................ 120  
Petroleum .......................................... 122  
Petroleum Industry Outlook ................. 123  
Ammonia Demand ................................ 125  
Refinery ........................................... 126  
Oilfield ............................................ 128  
Other Markets ..................................... 128  
Plastics ............................................ 129  
Lubricants ........................................ 131  

Rubber ............................................. 133  
Pharmaceuticals ................................. 135  
Wood Treatment ................................. 137  
All Other Markets ............................... 140  

**INDUSTRY STRUCTURE**

General ............................................. 143  
Market Share ...................................... 145  
Capacity Share .................................... 148  
Marketing & Distribution ...................... 150  
Research & Development ...................... 152  
Competitive Strategies ......................... 153  

**COMPANY PROFILES**

Akzo Nobel ....................................... 157  
Albemarle Corporation ......................... 160  
Alkyl Amines Chemicals ....................... 161  
Arkema SA .......................................... 163  
BASF SE ............................................ 165  
Celanese Corporation ......................... 168  
Creasyn Finechem Tianjin ..................... 170  
Croda International ............................ 171  
Daicel Corporation .............................. 173  
Dow Chemical ..................................... 174  
DuPont (El) de Nemours ....................... 180  
Eastman Chemical .............................. 183  
Evonik Industries ............................... 187  
GFS Chemicals .................................... 189  
Huntsman Corporation ......................... 190  
INEOS Group ...................................... 196  
Koch Industries ................................... 198  
Lonza Group ....................................... 200  
LyondellBasell Industries ..................... 202  
Mitsubishi Gas Chemical ...................... 204  
Mitsui Chemicals ............................... 207  
OXEA Sàrl .......................................... 209  
Procter & Gamble ............................... 210  
Sasol Limited ..................................... 211  
Solvay SA .......................................... 212  
Tosoh Corporation .............................. 215  
US Amines ........................................ 217  
Additional Companies in  
the Amines Industry ............................ 219-221
Amines
US Industry Study with Forecasts for 2019 & 2024

List of Tables

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

MARKET ENVIRONMENT
1 Macroeconomic Indicators ............... 8
2 Population & Households ................ 13
3 Personal Consumption Expenditures ..........16
4 Manufacturers' Shipments ............ 20
5 Amines Market, 2004-2014 .......... 22
6 Amines Pricing .................................. 25
7 US Foreign Trade in Amines ........... 29

PRODUCTS
1 Amines Demand by Type, ................. 36
2 Ethanolamines Supply & Demand .... 40
3 Ethanolamines Demand by Type .... 41
4 Diethanolamine Demand by Market ..........44
5 Monoethanolamine Demand by Market ..........47
6 Triethanolamine Demand by Market ..........49
7 Ethanolamines Capacity by Producer, 2014 .........51
8 Alkylamines Supply & Demand ........ 53
9 Alkylamines Demand by Type ........ 55
10 Methylamines Demand by Type .... 57
11 Dimethylamine Demand by Market ..........60
12 Monomethylamine Demand by Market ..........62
13 Trimethylamine Demand by Market ...........64
14 Other Alkylamines Demand by Market ...........66
15 Alkylamines Capacity by Producer, 2014 .........68
16 Fatty Amines Supply & Demand ....... 69
17 Fatty Amines Demand by Market ....... 71
18 Specialty Amines Supply & Demand ........ 75
19 Specialty Amines Demand by Market ........ 78
20 Ethyleneamines Supply & Demand .... 81
21 Ethyleneamines Demand by Type .... 83
22 Ethylenediamine Demand by Market ..........86
23 Diethylenetriamine Demand by Market ..........88
24 Other Ethyleneamines Demand by Market ..........90
25 Ethyleneamines Capacity by Producer, 2014 ..........91
26 Polyetheramines Supply & Demand ..........93
27 Polyetheramines Demand by Market ..........94

MARKETS
1 Amines Demand by Market ........... 98
2 Agricultural Chemical Indicators ... 101
3 Agricultural Chemicals Market: Amines Demand ..........103
4 Cleaning Products Shipments ....... 106
5 Cleaning Products Market: Amines Demand ..........108
6 Personal Care Product Shipments ..........111
7 Personal Care Products Market: Amines Demand ..........113
8 Nonagricultural Water Withdrawal & Usage ..........116
9 Water Treatment Market: Amines Demand ..........118
10 Natural Gas Supply & Demand ....... 120
11 Natural Gas Processing Market: Amines Demand ..........122
12 Petroleum Industry Indicators ....... 125
13 Petroleum Market: Amines Demand by Application & Type ..........126
14 Other Markets: Amines Demand ..........129
15 Plastics Production Market: Amines Demand ..........131
16 Lubricants Market: Amines Demand ..........133
17 Rubber Production Market: Amines Demand ..........135
18 Pharmaceuticals Market: Amines Demand ..........137
19 Wood Treatment Market: Amines Demand ..........139
20 Demand for Amines in All Other Markets ..........142

INDUSTRY STRUCTURE
1 US Amines Sales by Company, 2014 ..........144
2 Selected Cooperative Agreements ..........155

List of Charts

MARKET ENVIRONMENT
1 Amines Market, 2004-2014 ........ 23
2 US Amines Exports by Type, 2014 ... 31
3 US Amines Imports by Type, 2014 ...... 33

PRODUCTS
1 Amines Demand by Product, 2014: Volume & Value ........ 37
2 Ethanolamines Demand by Type, 2014 ..........42
3 Methylamines Demand by Type, 2014 ..........58
4 Ethyleneamines Demand by Type, 2014 ..........84

MARKETS
1 Amines Demand by Market, 2014 ..........99

INDUSTRY STRUCTURE
1 US Amines Market Share, 2014 ..........145
Demand will be driven by greater amounts of amine-based pesticides used in agriculture, rising demand for natural gas power generation, and growing construction activity that benefits amines used in adhesives.

US demand to rise 2.1% annually through 2019

US demand for amines will expand 2.1 percent per year to 3.2 billion pounds in 2019, valued at $3.8 billion. The growing use of pesticide-resistant crops will drive amine demand in agricultural chemicals as greater amounts of glyphosate and other amine-based pesticides are applied. Ethanolamines and specialty amines will benefit from rising demand for natural gas as power generation companies continue to replace coal-fired power plants with more efficient natural gas burning plants.

Rising construction activity will also help drive strong demand for polyetheramines, as well as other amines used in adhesives. However, the use of amines in wood treatment chemicals will not recover significantly as consumers shift to wood-alternative decking, and as treated wood producers increasingly turn to micronized and non-metal-based preservatives that are not formulated with amines. Additionally, growth will be limited by the maturity of some of the largest markets for amines, such as cleaning products and personal care products.

Agricultural chemicals to remain key market

Amine demand in agricultural chemicals has expanded rapidly in recent years as the widespread planting of glyphosate-resistant crops resulted in robust growth in the herbicide’s demand, and as Monsanto (the sole US producer of glyphosate) chose to pursue market share in 2010 by cutting prices. More recently, growing weed resistance to glyphosate, both in the US and abroad, has continued to drive amine demand for glyphosate as farmers have increased usage to maintain weed control. Agricultural companies have also responded by developing new varieties of corn and soybeans resistant to other herbicides beyond glyphosate, including the well-known herbicides 2,4-D and dicamba. Increased use of these crops going forward will drive growth in amine demand as farmers increase their herbicide use on crops containing the new genes.

Polyetheramines to be fastest growing product

Robust growth in building construction will help boost the production of coatings and adhesives, benefiting most of the commodity amines. Polyetheramines, which have found growing use in adhesives and advanced composites, will be among the biggest beneficiaries and will achieve the fastest growth of all amine types. However, rapid consumer adoption of wood-alternative decking options will limit demand for amines in wood preservatives. Additionally, an industry shift toward non-metal-based and micronized preservatives, which do not require amines in their formulations, will further restrain amine demand.

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MARKETS

Cleaning Products

Demand for amines in cleaning products totaled 595 million pounds in 2014, valued at $655 million. Amines are important components of cleaning products, aiding in the solubilization of dirt and soil from clothing, dishes, countertops, and other surfaces. A wide variety of benefits -- including mildness, environmental attributes, antibacterial effects, and thickening and emulsifying characteristics -- that make them increasingly desirable constituents of cleaning product formulations.

Cleaning Products Outlook

Detergent and cleaning product shipments from facilities in the US are expected to rise 2.9 percent per annum to $35.1 billion in 2019, with growth in real dollars averaging less than one percent yearly through the same period. Factors constraining growth will include slow -- though improving -- gains in polishes and sanitation goods, as well as demographic factors such as slow US population growth and the aging of the American populace. Nonetheless, increases in the value of detergent and cleaning product output will be supported by demand for new entries to these markets, which feature unique properties that typically command higher prices. Laundry detergent “pods,” for example, are helping to drive growth in laundry detergents by offering single unit doses of detergent in an easy-to-use format that makes laundry simpler and less time consuming. However, an increasing number of reports of accidental poisoning of children after ingestion of laundry pods may curtail these advances.

While the US cleaning product market is most often divided into household and industrial and institutional (I&I) segments, it can also be viewed in terms of three product types: polishes and sanitizers, cleaning products, and laundry products.

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### Table III-10

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<td>705</td>
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<td>1100</td>
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| *Excludes amount used in the production of other amines. Source: The Freedonia Group, Inc.

### Chart V-1

US AMINES MARKET SHARE, 2014<br>($3.3 billion)

- **Polishes and Sanitizers**<br>47.0%
- **Cleaning Products**<br>32.2%
- **Laundry Products**<br>20.8%
- **Other**<br>0.0%

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The Company is part of the US amines industry through the Polymers and Fibers segment, which includes the operations of INVISTA Sarl (Wichita, Kansas), a subsidiary that manufactures premium fibers, polymers, and intermediates primarily for nylon, spandex, and polyester applications. INVISTA’s activities include the Intermediates business, via which the company makes nylon intermediates and polymers for a wide range of specialty materials and other applications. Among INVISTA’s products are DYTEK multifunctional amine-, nitrile-, and boron-based chemicals intended to provide enhanced synthesis properties. Specifically, DYTEK amines are manufactured in aliphatic, cycloaliphatic, and aromatic varieties for a range of applications, including elastomers, epoxy curing agents, resins, adhesives, sealants, coatings, and scale and corrosion inhibitors. The company’s DYTEK line includes A, BHMT, DCH-99, EP, HMD, and HMI grades.

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US demand for paint and coatings is forecast to grow 3.8 percent annually to 1.4 billion gallons in 2019. Architecture will remain the largest market and grow the fastest. Water-based formulations will remain dominant and continue to gain market share. New technologies such as nanostructured coatings will drive future growth. This study analyzes the 1.2 billion gallon US paint and coatings industry, with forecasts for 2019 and 2024 by market, formulation and substrate. The study also evaluates company market share and profiles industry players.

Waxes
US demand for waxes will rise 1.8 percent annually through 2019 to three billion pounds, with value demand reaching $3.2 billion. Petroleum and mineral waxes will remain the dominant types, while synthetic waxes will grow the fastest. The leading industrial market will provide the best opportunities, particularly in the production of coatings and inks, adhesives, and building boards. This study analyzes the $2.4 billion US wax industry, with forecasts for 2019 and 2024 by type and market. The study also evaluates company market share and profiles industry players.

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 product and market. The study also evaluates company market share and profiles industry participants.

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.

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US demand for paint and coatings is forecast to grow 3.8 percent annually to 1.4 billion gallons in 2019. Architecture will remain the largest market and grow the fastest. Water-based formulations will remain dominant and continue to gain market share. New technologies such as nanostructured coatings will drive future growth. This study analyzes the 1.2 billion gallon US paint and coatings industry, with forecasts for 2019 and 2024 by market, formulation and substrate. The study also evaluates company market share and profiles industry players.

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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 product and market. The study also evaluates company market share and profiles industry participants.

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.

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

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.