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Specialty Silicas

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

Study #3368 | January 2016 | \$5200 | 256 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

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1 US Specialty Silica
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US demand for specialty silicas will be boosted by evolving market trends, such as increased usage of specialty silicas in tires, and also by pent-up demand in the housing and construction industry.

US demand to rise 4.7% annually through 2019

Demand for specialty silicas in the US is forecast to rise 4.7 percent per year to \$2.1 billion in 2019. Gains are expected to approach their longer-term growth rate, as they moderate from the post-recession growth of the 2009-2014 recovery period. Demand will be boosted by evolving market trends, such as increased usage in tires, and also by pent-up demand in the housing and construction industry. Many markets face maturity, including cosmetics and toiletries, food and beverages, and agricultural and animal care products, as do key applications within those markets such as toothpaste and cat litter.

Precipitated silica to remain largest segment

Specialty silicas include precipitated, fumed, gel, colloidal (or sol), and fused types. Demand for a specific silica product is closely tied to the outlook for the key industries in which it is used. For example, strong growth in building and construction spending is expected in the forecast period; as a result, silica gel, which finds application in a variety of coatings and paints, will see its most significant gains in that market. The outlook for precipitated silica, on the other hand, is tied strongly to the tire industry. Precipitated silica is finding greater use as a filler and reinforcement agent in tires, as it offers improved fuel economy over conventional tires.

US Specialty Silica Demand, 2019 (\$2.1 billion)



Precipitated silica will remain the largest product segment in both volume and value terms. Precipitated silica is also expected to be the fastest growing specialty silica product through 2019, boosted by robust gains in the large tire rubber sector, as well as in coatings and inks. Overall market value will benefit from the ongoing development of more expensive and higher-performance precipitated silicas, such as highly dispersible grades for tire reinforcement.

Rubber to be fastest growing market

Among specialty silica markets, rubber is forecast to expand at the most rapid pace in value terms through 2019,

further strengthening its position as the leading outlet for specialty silicas. Though advances in US rubber consumption will slow as domestic production of motor vehicles and other manufactured goods posts weak growth, in the tire rubber segment precipitated silica will find higher use and increased loadings in low rolling-resistance tires. Demand for these tires will be promoted by efforts on the part of vehicle manufacturers to improve fuel efficiency in order to comply with increasingly stringent governmental regulations, as well as to satisfy consumer demand for improved gas mileage. The nontire rubber segment is forecast to rise at a more moderate pace than that during the 2009-2014 period.

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Sample Text, Table & Chart

PRODUCTS

Precipitated Silica

Precipitated silica is the largest segment of the specialty silica market, accounting for just over half of total US demand in volume and value in 2014. Precipitated silica can be used as:

SAMPLE TEXT

- carrier
- catalyst raw material
- defoamer
- flatting agent
- matting agent
- reinforcing filler and extender
- stabilizer
- viscosity control agent

Precipitated silica is valued for its easy absorption and abrasion, lightness, fluidity, and ability to disperse through other materials (especially rubber and paints). Products are typically formulated to meet the needs of specific end uses and are available in a number of grades with varying particle sizes, densities, surface areas, and purity levels.

Amorphous silica powders are generally produced through the precipitation of silica particles from an aqueous sodium silicate solution. After the precipitation stage, the resulting material is filtered and milled or granulated to produce the desired particle size. It can also be further processed to make it hydrophobic or to enhance performance for specific applications. While its properties may vary, precipitated silica generally has a small particle size and con-

40

TABLE IV-15
PLASTICS MARKET FOR SPECIALTY SILICAS
BY TYPE & APPLICATION
(million pounds)

Item	2004	2009	2014	2019	2024
Plastics Consumption (bil lb) lb silica/000 lb plastic					
Plastics Specialty Silica Demand					
By Type:					
Precipitated Silica					
Fused Silica					
Fumed Silica					
Other					
By Application:					
Battery Separators					
Electronic Molding Compounds					
Other					
\$/lb					
Specialty Silica Demand (mil \$)					
% plastics					
Total Specialty Silica Demand (mil \$)					

Source: The Freedonia Group

SAMPLE TABLE

CHART V-1

US SPECIALTY SILICA MARKET SHARE, 2014
 (\$1.7 billion)



SAMPLE CHART

Sample Profile & Table, & Study Coverage

COMPANY PROFILES

Glassven CA

Zona Industrial Soco
 Calle Las Rosas
 La Victoria, Aragua
 Venezuela
 58-244-322-3223
 www.glassven.com

Annual Sales
 Employment:
 Key Products

SAMPLE PROFILE

Glassven manufactures and markets precipitated silicas, sodium silicates, and synthetic sodium aluminum silicates. The Company is privately held.

The Company participates in the specialty silica industry through the manufacture of precipitated silicas, which are employed in oral care products, tires and other rubber items, paints, inks, coatings, pharmaceuticals, food, and animal feed. Glassven typically markets these silicas under the RUBBERSIL, PIROSIL, DENTSIL, and GELSIL brand names.

RUBBERSIL precipitated silicas from the Company are intended for use as reinforcing fillers in rubber products. These silicas, which are offered in powdered or granular form, can impart enhanced hardness, tensile strength, tear and abrasion resistance, and good processing properties. For example, RUBBERSIL RS-150 TG silicas are designed to improve cut, chip, and chunk-out resistance in off-the-road tire treads. Glassven's PIROSIL precipitated silicas comprise high-purity powder products intended for use as anti-caking, free-flowing, process-aid, and carrier agents in the food and animal feed industries. The

TABLE IV-1

SPECIALTY SILICA DEMAND BY MARKET
 (million dollars)

Item	2004	2009	2014	2019	2024
Nondurable Goods Shipments (bil 2009\$)					
lb silica/mil \$ nondurables					
Specialty Silica Demand (mil lb)					
\$/lb					
Specialty Silica Demand					
Rubber					
Cosmetics & Toiletries					
Chemicals					
Coatings & Inks					
Electrical & Electronic Equipment					
Plastics					
Food & Beverages					
Agriculture & Animal Health					
Metals & Refractories					
Paper & Textiles					
Other					

SAMPLE TABLE

Source: The Freedonia Group

STUDY COVERAGE

This Freedonia study, *Specialty Silicas*, offers historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by market and product. Additionally, this study considers market environment factors, details the industry structure, evaluates company market share and profiles 29 US industry competitors.

Related Studies

World Rare Earths

Global demand for rare earths is forecast to increase 3.5 percent per year to 149,500 metric tons in 2019, valued at \$4.5 billion. Battery alloys, permanent magnets, and autocatalysts will be the fastest growing end use markets. China will remain the dominant geographic market, while India will grow the fastest. This study analyzes the 125,900 metric ton world rare earths industry, with forecasts for 2019 and 2024 by product and market for six world regions and 13 major countries. The study also evaluates company market share and profiles industry players.

#3349.....November 2015.....\$6300

World Industrial Silica Sand

Global demand for industrial silica sand is forecast to advance 5.5 percent annually to 291 million metric tons in 2018, with a value of \$12.5 billion. The Asia/Pacific region will remain the largest market, while North America will grow the fastest. Glass will remain the leading outlet, while the hydraulic fracturing segment grows the fastest. This study analyzes the 223 million metric ton world silica sand industry, with forecasts for 2018 and 2023 by market, world region, and for 19 countries. The study also evaluates company market share and profiles industry participants.

#3237.....December 2014.....\$6200

World Flat Glass

World flat glass demand is forecast to increase 6.6 percent per annum to \$102 billion in 2018. The dominant Asia/Pacific region will see the fastest gains in demand. The architectural market will remain the largest segment while other markets will grow the fastest, driven by rising manufacturing of higher value products like electronic displays. This study analyzes the \$72 billion world flat glass industry, with forecasts for 2018 and 2023 by market, world region, and for 21 countries. The study evaluates company market share and profiles industry players.

#3212.....November 2014.....\$6500

World Salt

Global demand for salt is forecast to climb 1.5 percent annually to 325 million metric tons in 2018, valued at \$13.4 billion. The dominant Asia/Pacific region will be the fastest growing market. Trends in the production of chlor-alkali chemicals will continue to have the most significant effect on regional salt demand. This study analyzes the 302 million metric ton world salt industry, with forecasts for 2018 and 2023 by market, production method, world region, and for 22 countries. The study also evaluates company market share and profiles industry competitors.

#3199.....August 2014.....\$6200

World Specialty Silicas

Global demand for specialty silicas will rise 5.0 percent per year through 2018 to 2.9 million metric tons, valued at \$6.9 billion. Rubber is the largest market and will also be the fastest growing. Precipitated silica will remain the dominant product type. The Asia/Pacific region will remain the largest and fastest growing market. This study analyzes the 2.3 million metric ton world specialty silica industry, with forecasts for 2018 and 2023 by product, market, world region, and for 16 countries. The study also evaluates company market share and profiles industry players.

#3178.....July 2014.....\$6300

About The Freedonia Group

The Freedonia Group, 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:

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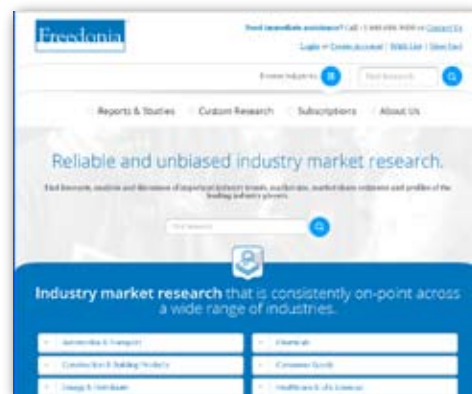
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