

# World Specialty Silicas

Industry Study with Forecasts for 2020 & 2025

Study #3407 | April 2016 | \$6400



## Tire rubber most important growth driver

The most important driver of demand for specialty silicas is the tire rubber market. This is the largest single market for specialty silicas, accounting for about 30 percent of demand in 2015. The tire rubber market was also the fastest growing over the 2010-2015 period and is forecast to continue holding this distinction through 2020. Demand for specialty silicas in tire rubber has been fueled by the rising adoption of green tires. Use of specialty silicas in tires improves fuel efficiency by reducing rolling resistance and also enhances performance features such as handling and traction. By 2020, green tires are forecast to represent more than 40 percent of all tires produced worldwide. Adoption of green tires has been aided by the introduction of tire labeling regulations in several countries. These regulations improve the performance qualities of tires, thus increasing the efficiency of tires.

## Asia/Pacific fastest growing region

The Asia/Pacific region holds the largest share of the global specialty silicas market, representing nearly half of total demand in 2015. The Asia/Pacific region has also been the fastest growing in recent years. India, Indonesia, and China are projected to be the three fastest growing national markets for specialty silicas through 2020. Even several of the Asia/Pacific region's more economically mature countries, such as South Korea and Taiwan, will post strong gains in specialty silica demand as consumption in the tire industry rises.

Growth in demand for specialty silicas in North America and Western Europe is forecast to trail the world average through 2020, reflecting the maturity of manufacturing industries throughout these regions. However, significant potential for increased specialty silica demand in tires still remains in both North America and Western Europe. The Africa/Mideast region is forecast to post above average gains in specialty silica demand through 2020, albeit from a small base.

## Precipitated silica most common

Precipitated silica is the most common type in large part because it is the only form utilized in the tire industry. Because of the expected fast growth in the tire market, precipitated silica is forecast to be the fastest growing product type through 2020. In particular, the most rapid growth will be for a subset of precipitated silica known as "highly dispersible silica" (HDS). HDS products are typically designed specifically for use in green tires. The other three types of specialty silicas are all forecast for growth rates within half a percent of each other.

## Study coverage

This study analyzes the global specialty silicas industry. It presents historical data (2005, 2010, 2015) plus forecasts (2020, 2025) for specialty silica supply and demand, as well as demand by product and market, in six regions and 16 countries. The study also considers market environment factors, examines industry structure, evaluates company market share and profiles 32 global industry competitors.

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United Kingdom  
Other Western Europe

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Taiwan  
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... plus macroeconomic Indicators

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**SOUTH KOREA: SPECIALTY SILICAS SUPPLY & DEMAND  
(thousand metric tons)**

Item	2005	2010	2015	2020	2025
Population (million persons)					
per capita GDP					
Gross Domestic Product (bil 2014\$)					
Manufacturing Value Added (bil 2014\$)					
Chemical Mfg Value Added (bil 2014\$)					
Rubber Demand (000 metric tons)					
kg silica/capita					
kg silica/000\$ MVA					
Specialty Silicas Demand					
net exports					
Specialty Silicas Production					

Source: The Freedonia Group

**TABLE VI-11**

**SOUTH KOREA: SPECIALTY SILICAS DEMAND BY MARKET  
(thousand metric tons)**

Item	2005	2010	2015	2020	2025
Specialty Silicas Demand					
Rubber:					
Tire					
Non-Tire					
Chemicals					
Food & Feed					
Cosmetics & Toiletries					
Industrial Processing					
Other					
% South Korea					
Asia/Pacific Specialty Silicas Demand					

Source: The Freedonia Group

**ASIA/PACIFIC**

**South Korea: Demand by Market**

Through 2020, demand for specialty silicas in South Korea is expected to advance. Growth will be driven by the tire industry, which will account for 65% of total demand. The introduction of a new labeling system in Europe and the country's tire industry will support these gains. South Korea is expected to account for 10% of growth. Green tires will account for 15% of South Korea in 2015, up from 10% in 2010. Rising popularity of green tires in export markets will further support increased manufacturing of tires that incorporate specialty silicas.

After tires, the largest markets for specialty silicas in South Korea are chemicals and industrial processing. South Korea's sizable chemicals industry consumes specialty silicas in the manufacture of products such as catalysts and defoamers. Demand for specialty silicas in the industrial processing market is driven by the electronics industry, which uses specialty silicas in CMP slurries for semiconductor manufacturing. Both the chemicals and industrial processing markets will post solid gains as manufacturing activity in South Korea expands. The cosmetics and toiletries market is forecast to be the second fastest growing market for specialty silicas in South Korea through 2020. Increasing production of silica-consuming products such as batteries and paper will support gains in demand for specialty silicas. Advances will be moderate in other markets, such as batteries and paper. Use of silica in applications within these markets tends to be mature, but solid economic advances will still contribute to growth.

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**This study can help you:**

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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## Related Studies

### World Rubber

World demand for rubber is forecast to increase 3.9 percent annually to 31.7 million metric tons in 2019. The share of tire and nontire applications will remain steady, as will the balance between synthetic and natural rubber. The Asia/Pacific region will be the largest and fastest growing market. This study analyzes the 26 million metric ton world rubber industry, with forecasts for 2019 and 2024 by type and application for six world regions and 23 major countries. The study also evaluates company market shares and profiles industry participants.

#3381..... February 2016 ..... \$6300

### Specialty Silicas

Demand for specialty silicas in the US is forecast to rise 4.7 percent annually to \$2.1 billion in 2019. Precipitated silica will be the largest and fastest growing product segment, driven by robust gains in the large tire rubber sector, as well as in coatings and inks. Rubber will also be the fastest growing market overall, with tire rubber outpacing the nontire rubber segment. This study analyzes the \$1.7 billion US specialty silica industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3368..... January 2016 ..... \$5200

### World Silicones

World demand for silicones will rise 5.7 percent annually to \$19.3 billion in 2019. The Asia/Pacific region will continue to be the strongest source of additional silicone demand, with electronics remaining its largest outlet. Construction will be the fastest growing market worldwide, with silicone gels among the fastest growing product types. This study examines the \$14.6 billion world silicones industry, with forecasts for 2019 and 2024 by market and product for 6 world regions and 15 countries. The study also evaluates company market share and profiles industry participants.

#3277..... May 2015 ..... \$6400

### 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

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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