

World Salt

Industry Study with Forecasts for 2020 & 2025

Study #3426 | July 2016 | \$6200



Chemical applications to grow the fastest

Growth in the Africa/Mideast and Asia/Pacific regions will drive salt demand in chemical applications, which will expand at the fastest pace of any major market for the mineral through 2020. New caustic soda production facilities in the United Arab Emirates, among other places, will boost output capacity and upstream demand for salt. On the other hand, global chemical salt demand will be offset to a certain extent by a European Union regulation set to take effect in December 2017 that will ban mercury-based chlorine production. The high cost involved in converting to membrane-based capacity will cause a number of plants to close, dampening output and therefore salt consumption.

Solar evaporation most common salt extraction method

Solar evaporation will remain by far the most common method for extracting salt in 2020, accounting for over two-fifths of worldwide output. This method's low costs relative to the more energy intensive rock salt mining and brine extraction processes will support gains. In addition, a number of countries located in the two fastest growing regional markets -- the Africa/Mideast and Asia/Pacific regions -- possess climates that are ideally suited for the production of solar salt, further aiding output increases. The vacuum evaporation process will also record robust

gains, supported by healthy growth in China, where higher purity standards are growing in importance in both the chemical manufacturing and food processing industries.

Food salt demand increasing with convenience foods

Increases in salt consumption by food processors across the globe will remain steady. Advances in food salt demand will be driven by rising personal incomes worldwide, which will boost the consumption of packaged and convenience foods in a number of countries. Sales to livestock feed producers and distributors will accelerate from a low 2015 base, as livestock populations in North America, the Asia/Pacific region, and Eastern Europe recover from a number of diseases that devastated herds in 2014 and 2015.

Study coverage

This study analyzes the world salt market. It presents historical data (2005, 2010, 2015) plus forecasts (2020, 2025) for supply and demand, as well as demand by market, in six regions and 18 major countries. The study also considers key market environment factors, assesses the industry structure, evaluates company market share and profiles 33 global industry competitors such as Cargill, China National Salt Industry, Compass Minerals and K+S.

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Industry Study with Historical Data for 2005,
2010 & 2015 plus Forecasts for 2020 & 2025

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ASIA/PACIFIC

India: Salt Markets

Consumption through 2020 to 2025 will represent fair share of the 2015 period and volume terms. This will stimulate additional salt demand, making the market for salt, which was opened in December 2011 in Guwahati. The facility possesses a capacity of 4,000 metric tons per year for the manufacture of agricultural and plumbing pipes.

Demand for salt in livestock applications will also record healthy gains, rebounding from a drop recorded from 2010 to 2015, as cattle, goat, pig, and sheep populations recover from a decline that occurred during that span. On the other hand, the widespread use of grazing basic feed mixtures, rather than commercial feeds that feature high salt contents, will restrain growth in salt sold to the livestock market. The fastest increases, however, will be posted in other, smaller markets as rising personal incomes and advancing economic development stimulate consumption in the water treatment and pharmaceutical industries.

India will also continue to be a leading supplier of processed foods, representing just under one-third of national salt consumption in 2020. India's rising per capita income levels, combined with expanding domestic demand and government investment, will support increased output of processed foods such as prepared meals and other items manufactured with salt. Food preservation activities by consumers at home will further stimulate salt consumption through 2020, although gains will be limited by the rising penetration of refrigerators in Indian households.

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INDONESIA: SALT SUPPLY & DEMAND (thousand metric tons)

Item	2005	2010	2015	2020	2025
Population (mil persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2014\$)					
m tons salt/000 persons					
m tons salt/mil \$ GDP					
Salt Demand					
net exports					
Salt Production					
% Indonesia					
Asia/Pacific Salt Production					

Source: The Freedonia Group

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TURKEY: SALT DEMAND BY MARKET (thousand metric tons)

Item	2005	2010	2015	2020	2025
Africa/Mideast Salt Demand					
% Turkey					
Salt Demand					
Chemical Manufacturing					
Food Processing					
Livestock					
Road Deicing & Other					
\$/metric ton					
Salt Demand (mil \$)					

Source: The Freedonia Group

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

Related Studies

Corrosion Inhibitors

US demand for corrosion inhibitors will increase 3.1 percent per year to \$2.8 billion in 2020. Growth will be fueled by overall economic expansion, with industries such as chemicals and metals manufacturing particularly benefiting. Recovery in the oil and gas market will take hold by 2020, aiding demand in drilling and hydraulic fracturing applications. This study analyzes the \$2.5 billion US market for corrosion inhibitors, with forecasts for 2020 and 2025 by application, market and product. The study also evaluates company market share and profiles industry competitors.

#3409.....April 2016..... \$5300

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 market, 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 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

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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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