Amines comprise a diverse group of chemical intermediates with broad application in many sectors of the world economy, so total demand largely follows global economic trends. Rising per capita incomes and consumer spending, increasing motor vehicle ownership, and modernizing agricultural industries in the developing world will all have a strong impact on amines consumption. As consumers in China, India, and other emerging markets gain additional spending power, they will demand higher quality cleaning and personal care products that greater utilize amine-based surfactants. Similarly, ownership of more and newer motor vehicles will necessitate additional usage of amines in lubricant and rubber applications.

**Glyphosate deceleration affects amines demand**

The pesticides market has provided strong growth for amines in recent years, in large part a result of greater use of glyphosate pesticides alongside genetically modified, glyphosate-tolerant crops. However, with glyphosate reaching market saturation in nations that consume the largest amounts, along with strong public opposition in a number of countries, the rapid growth seen in recent years will decelerate to more sustainable levels.

On the other hand, certain trends will have more positive impacts on demand. In the United States, Japan, and large West European nations, consumer preferences for milder and more effective cleaning and personal care products will increase demand for certain amines.

**Fatty amines to offer most rapid product growth**

Fatty amines will grow at the fastest pace among product categories through the forecast period, benefiting from their use in high-value cleaning and personal care products. However, ethanolamines will continue to be the largest volume type. Specialty amines will benefit from demand for new, more effective products in markets such as plastics, lubricants, and personal care products, particularly in the developed markets of Japan, North America, and Western Europe.

**Study coverage**

This Freedonia industry study details the 6.1 million metric ton amines market. It presents historical demand (2005, 2010, 2015) plus forecasts (2020, 2025) by product (ethanolamines, alkylamines, fatty amines, specialty amines, ethyleneamines), market (pesticides, cleaning products, personal care products, rubber, lubricants, water treatment chemicals, pharmaceuticals, other) in six world regions and 15 countries. The study also details company market share and offers competitive analysis on industry players, such as Akzo Nobel, BASF, Dow, Eastman, and Huntsman.
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Other Eastern Europe: Amines Demand -- Demand for amines in the other East European countries is forecast to increase 2.9 percent per year through 2020, with average demand growth somewhat faster than that in Russia during the same period. Amines demand will be driven by accelerating economic activity, manufacturing, and consumer spending, which will necessitate additional consumption in both consumer- and industrial-oriented applications. Advances will spread across a number of markets, with cleaning products remaining the largest.

The cleaning products market generated the most demand for amines in the subregion in 2015. As countries in the subregion continue to modernize, higher performing cleaning products that use amines in their formulation have become increasingly important. Demand growth for amines in this segment will remain relatively stable through 2020, with faster advances being held back by imports of many of these higher value products from Western Europe. Personal care products accounted for the second largest share of amines demand. This market will be impacted by similar factors to that for cleaning products.

Of the countries in the other Eastern Europe subregion, Poland generates the most amines demand due to its advanced manufacturing capabilities relative to other countries in the region. In 2015, Poland accounted for 32,000 metric tons of amine demand and will see healthy growth of 6.6 percent per year through 2020. Gains will be supported by advances

<table>
<thead>
<tr>
<th>Item</th>
<th>2005</th>
<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
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<tr>
<td>Asia/Pacific Amines Demand</td>
<td>1270</td>
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<td>% India</td>
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<td>9.7</td>
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<td>167</td>
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<td>By Product:</td>
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<tr>
<td>Ethanolamines</td>
<td>29</td>
<td>43</td>
<td>61</td>
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<td>Alkylamines</td>
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<td>46</td>
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<td>Fatty Amines</td>
<td>13</td>
<td>29</td>
<td>41</td>
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<td>Specialty Amines</td>
<td>19</td>
<td>29</td>
<td>37</td>
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<td>Ethyleneamines</td>
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<td>20</td>
<td>27</td>
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<td>By Market:</td>
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<td>Pesticides</td>
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<td>Cleaning Products</td>
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<td>91</td>
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<td>Personal Care Products</td>
<td>1</td>
<td>4</td>
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<td>Rubber</td>
<td>7</td>
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<td>Other Markets</td>
<td>53</td>
<td>78</td>
<td>99</td>
<td>136</td>
<td>176</td>
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Source: The Freedonia Group

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<th>2010</th>
<th>2015</th>
<th>2020</th>
<th>2025</th>
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<tr>
<td>Population (mil persons)</td>
<td>187</td>
<td>197</td>
<td>206</td>
<td>214</td>
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<td>per capita GDP (2014$)</td>
<td>13060</td>
<td>15430</td>
<td>15490</td>
<td>15630</td>
<td>17260</td>
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<td>Gross Domestic Product (bil 2014$)</td>
<td>2443</td>
<td>3041</td>
<td>3193</td>
<td>3345</td>
<td>3810</td>
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<td>Manufacturing Value Added (bil 2014$)</td>
<td>349</td>
<td>387</td>
<td>344</td>
<td>365</td>
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<td>Personal Consumption Expend (bil 2014$)</td>
<td>1378</td>
<td>1824</td>
<td>1990</td>
<td>2065</td>
<td>2335</td>
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<td>Cleaning Product Shipments (bil $)</td>
<td>2.0</td>
<td>5.5</td>
<td>3.9</td>
<td>4.4</td>
<td>5.3</td>
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<tr>
<td>Cosmetic &amp; Toiletry Shipments (bil $)</td>
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<td>6.0</td>
<td>4.6</td>
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<td>Rubber Demand (000 metric tons)</td>
<td>707</td>
<td>905</td>
<td>871</td>
<td>1036</td>
<td>1197</td>
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<td>kg amine/mil $ GDP</td>
<td></td>
<td></td>
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<td>Brazil Amines Demand (000 m ton)</td>
<td>138</td>
<td>240</td>
<td>298</td>
<td>347</td>
<td>405</td>
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<td>net imports</td>
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<td>25</td>
<td>58</td>
<td>57</td>
<td>70</td>
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<tr>
<td>Brazil Amines Production (000 m ton)</td>
<td>110</td>
<td>215</td>
<td>240</td>
<td>290</td>
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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

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Global Amines Market
Industry Study with Forecasts for 2020 & 2025

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US demand for industrial and institutional (I&I) cleaning chemicals is forecast to rise 2.3% annually to $11.7 billion in 2020. Growth in commercial revenues and establishments will fuel gains in cleaning chemical demand for the commercial sector. Cleaners used in institutional settings will constitute the fastest growing category. This study assesses the $10.4 billion US market for I&I cleaning chemicals, providing projections for 2020 and 2025 by product, market and raw material. In addition, the study analyzes company market share and profiles participants in the US industry.

#3424.................June 2016.................. $5300

**Home & Garden Pesticides**
US demand for home and garden pesticides will grow 3.1% per year to $2.4 billion in 2020. Insecticides will remain dominant while fungicides and other products such as animal repellents and rodenticides will grow the fastest. Household applications will remain the largest segment, but will be slightly outpaced by lawn and garden uses. This study analyzes the $2.1 billion US home and garden pesticide industry, with forecasts for 2020 and 2025 by product, application, and raw material. The study also evaluates company market share and profiles industry players.

#3384.............February 2016............... $5200

**Amines**
US demand for amines will expand 2.1% per year to 3.2 billion pounds in 2019, valued at $3.8 billion. Agricultural chemicals will remain the fastest growing market, driven by increased use of herbicide-resistant crops that require greater amounts of amine-based pesticides. Polyetheramines and alkylamines will be the fastest growing products. This study analyzes the 2.9 billion pound US amines industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share, and profiles industry players.

#3330............October 2015............. $5200

**Water Treatment Chemicals**
Demand for water treatment chemicals in the US is forecast to rise 3.2% per year to $7.5 billion in 2019, with volume reaching 15.5 billion pounds. Foam control agents and coagulants and flocculants will be the fastest growing water treatment chemicals. Energy and manufacturing will be the fastest growing markets. This study analyzes the $6.4 billion US water treatment chemical industry, with forecasts for 2019 and 2024 by product, application and market. The study also evaluates company market share and profiles industry players.

#3322.............July 2015............. $5300

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- Using input/output ratios, flow charts & other economic methods to quantify data
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- Researching a proprietary database that includes trade publications, government reports & corporate literature

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- Security
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