

Global Amines Market

Industry Study with Forecasts for 2020 & 2025

Study #3475 | November 2016 | \$6200



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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Industry Study with historical data for 2005, 2010 & 2015 plus forecasts for 2020 & 2025

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North America

Amines Demand

United States

Canada

Mexico

Western Europe

Amines Demand

Germany

France

United Kingdom

Italy

Spain

Other Western Europe

Asia/Pacific

Amines Demand

China

Japan

India

South Korea

Australia

Other Asia/Pacific

Other Regions

Central & South America

Amines Demand

Brazil

Other Central & South America

Eastern Europe

Amines Demand

Russia

Other Eastern Europe

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Amines Demand by

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Other Eastern Europe: Amines Demand -- Demand for amines in the other East European countries is forecast to increase percent per year through 2020, with average demand growth some 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 both consumer- and industrial-oriented applications. Advances will spread across a number of markets, with cleaning products remain 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 2025 with faster advances being held back by imports of many of these value products from Western Europe. Personal care products account for the second largest share of amines demand. This market will be impacted by similar factors to that for cleaning products.

a small but growing market with significant agricultural pesticides. However, expansion in this market,

the subregion, Poland advanced manufacturing production. In 2015, Poland and will see higher gains will be supported

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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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INDIA: AMINES DEMAND BY PRODUCT & MARKET (thousand metric tons)

Item	2005	2010	2015	2020	2025
Asia/Pacific Amines Demand % India					
India Amines Demand					
By Product:					
Ethanolamines					
Alkylamines					
Fatty Amines					
Specialty Amines					
Ethyleneamines					
By Market:					
Pesticides					
Cleaning Products					
Personal Care Products					
Rubber					
Other Markets					

Source: The Freedonia Group

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BRAZIL: AMINES SUPPLY & DEMAND

Item	2005	2010	2015	2020	2025
Population (mil persons)					
per capita GDP (2014\$)					
Gross Domestic Product (bil 2014\$)					
Manufacturing Value Added (bil 2014\$)					
Personal Consumption Expend (bil 2014\$)					
Cleaning Product Shipments (bil \$)					
Cosmetic & Toiletry Shipments (bil \$)					
Rubber Demand (000 metric tons)					
kg amine/mil \$ GDP					
Brazil Amines Demand (000 m ton)					
- net imports					
Brazil Amines Production (000 m ton)					

Source: The Freedonia Group

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Related Studies

Industrial & Institutional (I&I) Cleaning Chemicals

US demand for industrial and institutional (I&I) cleaning chemicals is fore-cast 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 market, product 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 percent yearly 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 percent 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 percent 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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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

About The Freedonia Group

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