Global Flame Retardants Market

Industry Study with Forecasts for 2020 & 2025

Study #3499 | February 2017 | $6300

Slower growth for flame retardants in China will be offset by improved markets in India, Brazil, and Eastern Europe. Increases in value terms will accelerate significantly, as global commodity prices improve from a low 2015 base.

Phosphorus-based flame retardants will record by far the fastest market growth of any major product type. As halogenated retardants, such as decaBDE, are phased out worldwide, end users have scrambled to find effective alternatives. Nonhalogenated phosphorus compounds have proven to be the best substitute on both a cost and performance basis.

Asia/Pacific, Africa/Mideast regions are largest markets

In percentage terms, expansion in the Africa/Mideast and Asia/Pacific regions will be robust, and they will remain the strongest regional markets for flame retardants through 2020. In both regions, improvements in motor vehicle production will provide significant opportunities for flame retardant suppliers. In addition, rising standards of living in both regions are expected to lead to improvements in vehicle quality, creating demand for car components that more closely resemble their developed world counterparts. This will spur demand for high-performance under-the-hood plastics, as well as interior paneling and upholstery that contain flame retardant chemicals.

US, China to pace construction flame retardant market

The construction market will record the fastest gains of the major markets. Between 2005 and 2015, China’s building boom fueled robust increases in flame retardant demand, despite low overall utilization rates. Through 2020, however, a slowdown in China’s construction industry will return supplier focus to the US, where further growth will lead to steady gains in flame retardant volume terms. Nevertheless, China will remain the dominant global market for flame retardants in construction products.

Study coverage

This Freedonia study analyzes the global flame retardant additive market. The study provides historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by product (alumina trihydrate, phosphorus compounds, brominated compounds, boron compounds, antimony compounds, chlorinated compounds) and market (construction, electrical/electronic products, wire and cable, motor vehicles, textiles, other). The study also provides company market share and competitive analysis on industry leaders including Albemarle, Chemtura, China Minmetals, Clariant International, Israel Chemicals, Jiangsu Yoke Technology, JM Huber, LANXESS, Nabaltec, US Borax (Rio Tinto) and Zhejiang Wansheng.
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OTHER REGIONS

Brazil: Products
In 2015, flame retardant consumption in Brazil totaled 31,700 metric tons, comprising 53 percent of Central and South American consumption and making it the largest market in the region. Intensity of use related to population and economic output are well below the global norm as well as below other countries at a similar level of economic development (such as Mexico and Thailand). This is due in part to the fact that Brazil does not have a particularly large electronics industry, nor has it been a significant producer of plastic construction products such as foamed insulation.

Sales of flame retardants in Brazil are forecast to grow 1.9 percent annually through 2020 to 34,900 metric tons, valued at $78 million. This will represent a rebound from the declines registered between 2010 and 2015, when nearly every major industry that utilizes flame retardants suffered contractions. In the near term, renewed strength in building construction spending, electrical and electronic product output, and motor vehicle production will support a return to market growth. However, increases are expected to be limited by tepid gains in wire and cable shipments.

In 2015, alumina trihydrate (ATH) was the most widely used flame retardant type in Brazil, accounting for 39 percent of the market. Brominated and chlorinated compounds also comprised a sizable share of sales, representing 18 percent and 13 percent, respectively; phosphorus-based products overtook chlorinated retardants in 2015 to account for nearly 14 percent of sales. Demand for chlorinated retardants has historically been supported by the country’s wire and cable industry. However, a shift in the product mix to the less environmentally reactive ATH will limit consumption going forward, both for halogenated retardants and related

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<th>United Kingdom: Flame Retardant Demand by Product, 2005 - 2025 (thousand metric tons)</th>
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<tbody>
<tr>
<td>Item</td>
<td>2005</td>
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<tr>
<td>Flame Retardant Demand</td>
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<tr>
<td>Alumina Trihydrate</td>
<td>58.5</td>
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<tr>
<td>Phosphorus Compounds</td>
<td>11.7</td>
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<tr>
<td>Brominated Compounds</td>
<td>7.1</td>
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<td>Antimony Compounds</td>
<td>2.4</td>
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<tr>
<td>Boron Compounds</td>
<td>4.7</td>
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<tr>
<td>Chlorinated Compounds</td>
<td>5.2</td>
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<td>Other Compounds</td>
<td>5.9</td>
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</tbody>
</table>

Source: The Freedonia Group

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<th>Table 6-14</th>
<th>India: Flame Retardant Demand by Market, 2005 - 2025 (thousand metric tons)</th>
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<tbody>
<tr>
<td>Item</td>
<td>2005</td>
</tr>
<tr>
<td>Manufacturing Value Added (bil 2014$)</td>
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<tr>
<td>kg flame retardant/mil $ MVA</td>
<td>63</td>
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<tr>
<td>Flame Retardant Demand</td>
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<tr>
<td>Construction</td>
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<tr>
<td>Electrical &amp; Electronics</td>
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<tr>
<td>Wire &amp; Cable</td>
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<tr>
<td>Motor Vehicles</td>
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<td>Textiles</td>
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<tr>
<td>Other</td>
<td></td>
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</tbody>
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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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Related Studies

**Solvents**
US demand for solvents is forecast to rise just over one percent per year through 2020 to 9.6 billion pounds. Environmental regulations will continue to drive a shift toward less hazardous solvents. Public perception and consumer preference will also favor green products derived from renewable sources such as soy methyl ester and terpenes. This study offers historical demand data plus forecasts for 2020 and 2025 by product and market. The study also details key market environment factors, evaluates company market share and profiles US industry competitors.

**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.

**Outdoor Furniture & Grills**
US demand for outdoor furniture, heaters, cooking appliances, and accessories is forecast to rise 3.7 percent annually to $9.1 billion in 2019. Trends toward at-home al fresco entertainment and "staycations" will support gains. Outdoor furniture and accessories will remain dominant, while patio heating products will grow the fastest from a small base. This study analyzes the $7.6 billion US outdoor furniture and grill industry, with forecasts for 2019 and 2024 by product, market, and region. The study also evaluates company market share and profiles industry players.

**Refractories**
Demand for refractories in the US will rise 3.3 percent per year through 2019 to $3.1 billion. Volume increases will be much more sluggish, as improvements in refractory designs enable less material to be used per ton of output. Nonclay refractories will outpace clay refractories based on performance advantages that boost the use of nonclay types. This study analyzes the $2.6 billion US refractory industry, with forecasts for 2019 and 2024 by refractory form, material and market. The study also evaluates company market share and profiles industry competitors.

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

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:

- Automotive & Transport
- Chemicals
- Construction & Building Products
- Consumer Goods
- Energy & Petroleum
- Industrial Components
- Healthcare & Life Sciences
- Machinery & Equipment
- Metals, Minerals & Glass
- Packaging
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