

# Global Flame Retardants Market

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Industry Study with Forecasts for 2020 & 2025

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Study #3499 | February 2017 | \$6300

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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.

## 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 relative to population and economic output are well below the global norm, 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 foam insulation.

Sales of flame retardants are expected to continue to grow through 2020 to represent a rebound when nearly every other industry is in contraction. In the construction sector, spending, electrical production will support wire gains in wire

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 10 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 likely result in consumption going forward, both for halogenated retardants and related

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Table 5-13 | United Kingdom: Flame Retardant Demand by Product, 2005 - 2025 (thousand metric tons)

Item	2005	2010	2015	2020	2025
Flame Retardant Demand					
Alumina Trihydrate					
Phosphorus Compounds					
Brominated Compounds					
Antimony Compounds					
Boron Compounds					
Chlorinated Compounds					
Other Compounds					

Source: The Freedonia Group

Table 6-14 | India: Flame Retardant Demand by Market, 2005 - 2025 (thousand metric tons)

Item	2005	2010	2015	2020	2025
Manufacturing Value Added (bil 2014\$)					
kg flame retardant/mil \$ MVA					
Flame Retardant Demand					
Construction					
Electrical & Electronics					
Wire & Cable					
Motor Vehicles					
Textiles					
Other					

Source: The Freedonia Group

Table 4-9 | Mexico: Key Indicators for Flame Retardant Demand, 2005 - 2025

Item	2005	2010	2015	2020	2025
Population (million)					
GDP/capita					
Gross Domestic Product (bil 2014\$)					
Building Construction Expenditures (bil 2014\$)					
Manufacturing Value Added (bil 2014\$)					
Electrical & Electronic MVA (bil 2014\$)					
Motor Vehicle Production (000 units)					
Plastic Resin Demand (mil metric tons)					
kg flame retardant/capita					
kg flame retardant/mil \$ GDP					
Flame Retardant Demand (000 metric tons)					
\$/kg					
Flame Retardant 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

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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.

#3429..... July 2016 ..... \$5300

### 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

### 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.

#3344..... October 2015 ..... \$5300

### 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.

#3295..... June 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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