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World Silicones

Industry Study with Forecasts for **2019 & 2024**

Study #3277 | May 2015 | $6400 | 313 pages

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Industry Study with Forecasts for ***2019 & 2024***

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Freedonia®

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NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

World Silicones

Industry Study with Forecasts for ***2019 & 2024***

While the heightened growth of the rebound period after 2009 will not continue, there will be strong demand gains in developing regions based on increased penetration of silicones in less mature markets.

World demand to rise 5.7% annually through 2019

World demand for silicones is forecast to rise 5.7 percent per year to $19.3 billion in 2019. The pace of growth in value terms will be in line with that seen over the 2009-2014 period, largely due to an improved outlook for silicone prices. However, gains in volume demand will slow somewhat. Growth in global silicone consumption over the 2009-2014 period was bolstered by recovery from the effects of the 2009 recession, and the heightened growth of this rebound period will not continue into the coming years. Nevertheless, demand for silicones in developing regions is still expected to post strong gains through 2019, benefiting from economic advancement and increased penetration of silicones in less mature markets.

World Silicone Demand, 2019
($19.3 billion)

Asia/Pacific region to claim most new demand

The Asia/Pacific region will continue to be the strongest source of additional silicone demand, accounting for 57 percent of the total increase in global silicone consumption between 2014 and 2019. The bulk of these gains will be attributable to China, which will represent nearly three-fifths of the Asia/Pacific total in 2019. Although China's silicone market will not maintain the extremely rapid pace of gains seen in recent years, growth will still continue to be well in excess of the global average. Other developing countries in the Asia/Pacific region, such as India, Indonesia, and Thailand, are also expected to post strong gains in silicone demand, but the overall pace of growth will be limited by a below average performance in Japan, which will remain the second largest silicone market in the region. Electrical and electronic products will remain the largest outlet for silicones in the Asia/Pacific region, reflecting the region's dominance in electronics manufacturing.

Demand in other regions to advance more slowly

The outlook for silicone demand in North America and Western Europe is somewhat weaker, reflecting the maturity of both manufacturing industries in general and the use of silicones. In the US market, the largest in the world, demand for silicones will be bolstered by a major improvement in construction activity. Demand for silicones in Western Europe will advance slowly, although the region's affluence will continue to support significant demand for silicones in the health and personal care market. Above average growth is expected in the Africa/Mideast region, aided by urbanization and the emergence of the middle class in some of the more developed nations. Gains in silicone demand in Central and South America will be near the world average, benefiting from a rebound in motor vehicle production. Gains in Eastern Europe are expected to be slightly below the world average, but will still represent a healthy increase.

Sample Text, Table & Chart

ASIA/PACIFIC

South Korea: Markets & Products

Demand for silicones in South Korea is projected to adv
percent per year to $ [SAMPLE TEXT] will trail the
average but will be s tandards. Gr
demand for silicones 19 will be si
that seen during the facturing out
country was not seri al economic
of 2009. South Kor t intensive co
silicones, ranking first DP and fourth
per capita in 2014.

South Korea is home to a number of silicone-consuming
turing industries, with the electronic products industry in par
viding a major source of demand. The electrical and electron
accounted for 35 percent of silicone demand in South Korea
larger share than in any other major country except Taiwan.
products manufacturing is expected to continue to rise throug
supporting healthy growth in silicone demand. Transportatio
second largest market for silicones in the country, but gains in this market are expected to trail the average, reflecting sluggish growth in motor vehicle output. The construction market is also expected to post below average growth, although gains here will be an improvement on those seen over the 2009-2014 period, when construction spending contracted. The health and personal care market will post the fastest growth, as both health spending and personal care product shipments will continue to rise at a strong pace through 2019. Manufacturing of chemicals
at about the same rate as manufacturing output in general, su
solid growth for silicones in the chemicals market.

Silicone elastomers and fluids combined to account for
of demand in South Korea in 2014. Demand for both produc
vance at rates near the average, reflecting the solid growth ex

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TABLE VI-8

SOUTH KOREA: SILICONE DEMAND BY MARKET & PRODUCT
(million dollars)

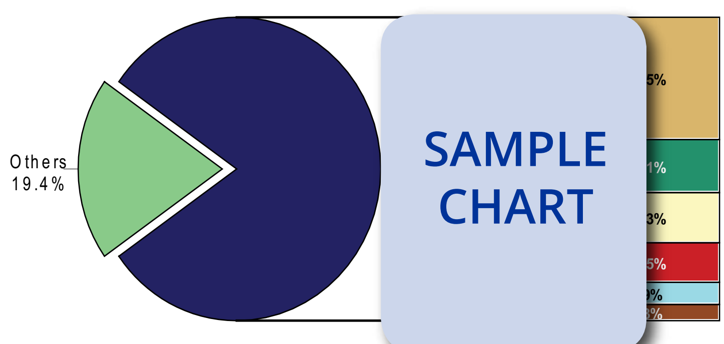
Item	2004	2009	2014	2019	2024
Manufacturing Value Added (bil 2013$)					
$ silicones/000$ MVA					
Silicone Demand					
By Market:					
Electrical & Electronic					
Construction					
Health & Personal Care					
Transportation					
Chemical					
Other Markets					
By Product:					
Elastomers					
Fluids					
Resins					
Gels & Other Products					
% South Korea Asia/Pacific Silicone Demand					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART VIII-1

WORLD SILICONE MARKET SHARE, 2014
($14.6 billion)



World Silicones

Industry Study with Forecasts for ***2019 & 2024***

Sample Profile & Table, & Study Coverage

TABLE VI-7

SOUTH KOREA:
KEY INDICATORS FOR SILICONE DEMAND

Item	2004	2009	2014	2019	2024
Population (million)					
GDP/capita					
Gross Domestic Product (bil 2013$)					
Manufacturing Value Added (bil 2013$)					
Construction Expenditures (bil 2013$)					
Health Expenditures (bil $)					
Chemical Mfg Value Added (bil 2013$)					
Motor Vehicle Production (000 units)					
$ silicones/capita					
$ silicones/mil $ GDP					
Silicone Demand (mil $)					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

CSL Silicones Incorporated
144 Woodlawn Road West
Guelph, Ontario N1H 1B5
Canada
519-836-9044
http://www.csls

Annual Sales:
Employment:

Key Products:

SAMPLE PROFILE

CSL Silicones is a manufacturer of room temperature vulcanizing (RTV) silicone products. The privately held company's operations are in Guelph, Ontario, Canada.

The Company is active in the world silicone industry through the manufacture of RTV silicone products, which are intended for use in the building, construction, electronics, electrical, manufacturing, industrial, transportation, energy, and infrastructure markets. CSL Silicones' products consist of SI-COAT silicone coatings and CSL silicone sealants.

The SI-COAT range includes anti-graffiti, anti-corrosion, and high-voltage insulator coatings. Anti-graffiti coatings include SI-COAT 529, a pigmented coating suitable for use over metal, concrete, brick, stone, wood, fiberglass, and pre-existing coatings. One representative anti-corrosion coating is SI-COAT 579, which is used in above-grade applications in both new and retrofit locations. High-voltage insulator coatings are formulated to provide extended-term flashover protection in adverse conditions.

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STUDY COVERAGE

This Freedonia study, ***World Silicones***, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product and market in 6 regions and 15 countries. The study also considers market environment factors, examines the industry structure, evaluates company market share data and profiles 34 global industry competitors.

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Related Studies

Fluoropolymers

This study analyzes the US fluoropolymer industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., PTFE, fluoroelastomers, FEP, PVDF, PVF), application (e.g., coatings and liners, mechanical parts, films) and market (e.g., industrial processing, electrical and electronic, transportation equipment, construction). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3278..................June 2015.....................$5300

Engineering Plastics

Demand for engineering plastics in the US is expected to rise 2.6 percent per year to 5.1 billion pounds in 2019. Nylon, ABS, and polycarbonate will remain the three largest engineering plastics by volume, with nylon the fastest growing of the three. Smaller-volume engineering plastics such as polyphenylene sulfide, sulfone polymers, and fluoropolymers will grow the fastest. This study analyzes the 4.5 billion pound US engineering plastic industry, with forecasts for 2019 and 2024 by resin and market. The study also evaluates company market share and profiles industry players.

#3242..................April 2015 ....$5300

World Emulsion Polymers

Global demand for emulsion polymers will rise 4.6 percent annually to 12.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest-growing market. The paint and coatings segment will remain the largest and fastest-growing application, followed by adhesives in size and growth rate. This study analyzes the 10 million metric ton world emulsion polymer industry, with forecasts for 2018 and 2023 by market, polymer, world region, and for 16 countries. The study also evaluates company market share and profiles industry participants.

#3216...............October 2014..................$6200

World Polyethylene

Global polyethylene demand will rise 4.0 percent yearly to 99.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest growing market, driven by China. Following a decade of decline, North America will add nine million tons of production capacity through 2023. This study analyzes the 82 million metric ton world polyethylene industry, with capacity, production and demand forecasts for 2018 and 2023 by product, market, world region, and for 27 countries. The study also evaluates company market share and profiles industry players.

#3210...............October 2014..................$6200

Silicones

US demand for silicones is forecast to climb 4.7 percent annually to $4.3 billion in 2018, with volume rising 3.2 percent per year to 900 million pounds. Silicone elastomers will grow the fastest, overtaking fluids as the leading product type. The construction and medical markets will be the fastest growing segments, while the industrial market will remain dominant. This study analyzes the $3.4 billion US silicones industry, with forecasts for 2018 and 2023 by product, market and application. It also evaluates company market share and profiles industry players.

#3138................ March 2014...................$5100

About The Freedonia Group

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