

[>> Download this market research report on Reportlinker.com](#)

World Flame Retardants Industry

Published on December 2010

Report Summary

Global demand to rise 6.1% annually through 2014

World demand for flame retardant additives is forecast to rise 6.1 percent per year to 2.2 million metric tons in 2014. Gains will represent a substantial acceleration over the 2004-2009 period, in which demand was severely impacted by the effects of a global economic slowdown, especially in the mature markets of the US, Western Europe and Japan. In addition to an improved economic outlook, flame retardant demand through 2014 will also benefit from trends toward more stringent safety and flammability standards -- particularly in the developing world -- and the rising use of plastic products over less flammable materials. The Asia/Pacific region will continue to be the largest and fastest-growing market for flame retardants through 2014, accounting for nearly half of world demand. Advances will be fueled by nearly ten percent annual growth in the large Chinese market, strong increases in major electronics-producing countries such as Taiwan and South Korea, and a solid turnaround in Japanese demand. Gains in North America and Western Europe will rise at a more subdued pace, although each -- like Japan -- will exhibit a strong rebound from recent declines in demand.

Environmental, health issues causing shift in product mix

Concerns over the possibly damaging environmental and health effects of halogenated flame retardants have begun to cause a considerable shift in the product mix. Brominated flame retardants have come under increased scrutiny, and a combination of government regulations and image-conscious product manufacturers have led suppliers of the widely used chemical decaBDE to begin phasing out its production. Additionally, although environmentally unfavorable chlorinated flame retardants continue to enjoy high levels of demand in less developed parts of the world, countries such as China are rapidly moving away from these chemicals, spurring robust growth in demand for other flame retardants, including phosphorus and alumina trihydrate.

Alumina trihydrate to remain leading product

Alumina trihydrate was the leading flame retardant product by volume in 2009, and is also expected to see above-average gains in demand through 2014, driven by trends toward nonhalogenated chemicals. Even more rapid advances, however, are forecast for phosphorus compounds and other flame retardants such as magnesium hydroxide, which feature favorable environmental and health profiles. Although brominated flame retardants are being phased out of a number of applications, demand for these products will remain healthy going forward, supported by their superior performance and by new, more environmentally friendly formulations.

Motor vehicles to be fastest growing market

Construction products were the leading market for flame retardants in 2009, accounting for one-quarter of total demand. However, faster gains are expected for electrical and electronic applications, fueled by rising production of electronic products and increasing flammability standards in Western Europe and the developing world. Motor vehicle markets for flame retardants will exhibit the most rapid advances in demand, as the use of plastic components rises and vehicle production in the US, Western Europe and Japan rebounds from an extremely low 2009 base.

Study coverage

This new industry study presents historical demand data (1999, 2004, 2009) plus forecasts for 2014 and 2019 by product, market, world region and for 18 major countries. The study also considers key market environment factors, evaluates company market share and profiles 38 industry competitors.

Table of Content

INTRODUCTION xi

I. EXECUTIVE SUMMARY 1

II. MARKET ENVIRONMENT 4

General 4

Global Economic Overview 5

Recent Historical Trends 5

World Economic Outlook 7

World Demographic Outlook 11

Building Construction Outlook 13

World Manufacturing Overview 16

World Electronics Outlook 18

World Motor Vehicle Production Outlook 20

World Wire & Cable Production 23

World Plastics Production Outlook 26

Regulatory Factors 28

Environmental & Health Issues 29

European Union 31

United States 32

Other Regions 33

Building, Fire & Electrical Codes 34

Recycling & Disposal Issues 37

III. OVERVIEW 39

General 39

Demand by Region 40

Demand by Product 44

Alumina Trihydrate 48

Brominated Compounds 51

Phosphorus Compounds 55

Chlorinated Compounds 59

Antimony Compounds 61

Boron Compounds 63

Other Products 65

Demand by Market 68

Construction 71
Electrical & Electronics 74
Wire & Cable 77
Motor Vehicles 79
Textiles 81
Other Markets 84
Production & Trade 85

IV. NORTH AMERICA 88

Overview 88

Flame Retardant Demand 89

United States 92

Canada 99

Mexico 104

V. WESTERN EUROPE 110

Overview 110
Flame Retardant Demand 112
Germany 114
France 120
Italy 125
Spain 131
United Kingdom 136
Netherlands 141
Belgium 145
Other Western Europe 150

VI. ASIA/PACIFIC 155

Overview 155
Flame Retardant Demand 157
China 160
Japan 168
South Korea 175
Taiwan 181
India 187
Thailand 192
Other Asia/Pacific 196

VII. OTHER REGIONS 202

Central & South America 202
Overview 202
Flame Retardant Demand 204
Brazil 205
Other Central & South America 210
Eastern Europe 216
Overview 216

Flame Retardant Demand 217
Russia 219
Other Eastern Europe 224
Africa/Mideast 229

VIII. INDUSTRY STRUCTURE 235

General 235
Market Share 237
Industry Restructuring 240
Competitive Strategies 242
Product Differentiation & Market Segmentation 243
Research & Development 243
Cooperative Agreements 244
Marketing & Distribution 247
Company Profiles 249
Akzo Nobel NV 250
Albemarle Corporation 252
Almatis GmbH 255
BASF SE 258
Borealis GmbH 260
Budenheim Iberica SLSC, see Oetker (Dr. August)
Campine NV 262
Chemtura Corporation 263
China Minmetals Nonferrous Metals Company Limited 266
Ciba Specialty Chemicals Holding, see BASF
Clariant International Limited 268
Cytec Industries Incorporated 270
Daihachi Chemical Industry Company 271
Dead Sea Bromine, see Israel Chemicals
Dover Chemical, see ICC Industries
Eti Mine Works General Management 273
GLCC-Laurel, see Chemtura
Glencore International AG 274
Hsikwangshan Twinkling Star Company Limited 275
Huber (JM) Corporation 277
ICC Industries Incorporated 279
Israel Chemicals Limited 281
Italmatch Chemicals SpA 284
LANXESS AG 286
MAGNIFIN Magnesiaprodukte, see Albemarle
Manac Incorporated 288
Martin Marietta Materials Incorporated 289
Martinswerk, see Albemarle
Nabaltec AG 290
Nashtec, see Glencore International and Nabaltec
Nihon Seiko Company Limited 292
Niknam Chemicals Private Limited 293
Nippon Carbide Industries Company Incorporated 295
Occidental Petroleum Corporation 296

Oetker (Dr. August) KG 298
OxyChem, see Occidental Petroleum
Rinkagaku Kogyo, see Tosoh
Rio Tinto Group 300
Sanwa Chemical, see Nippon Carbide Industries
SCR-Sibelco NV 303
Shandong Brother Science & Technology Company Limited 305
Shandong Haiwang Chemical Company Limited 306
Shanghai Chlor-Alkali Chemical Company Limited 307
Sherwin Alumina, see Glencore International
Showa Denko KK 308
Solaris ChemTech Limited 309
Suzuhiro Chemical Company Limited 310
Tina Organics Private Limited 312
Tosoh Corporation 313

LIST OF TABLES

SECTION I -- EXECUTIVE SUMMARY

Summary Table 3

SECTION II -- MARKET ENVIRONMENT

1 World Gross Domestic Product by Region 11
2 World Population 13
3 World Building Construction Expenditures 16
4 World Manufacturing Value Added 18
5 World Electronic Product Shipments 20
6 World Motor Vehicle Production 23
7 World Plastic Resin Production 28

SECTION III -- OVERVIEW

1 World Flame Retardant Demand by Region 43
2 World Flame Retardant Demand by Product 46
3 World Alumina Trihydrate Flame Retardant Demand 51
4 World Brominated Flame Retardant Demand 55
5 World Phosphorus Flame Retardant Demand 58
6 World Chlorinated Flame Retardant Demand 60
7 World Antimony Flame Retardant Demand 63
8 World Boron Flame Retardant Demand 65
9 World Other Flame Retardant Demand 68
10 World Flame Retardant Demand by Market 70
11 World Construction Market for Flame Retardants 74
12 World Electrical & Electronic Markets for Flame Retardants 77
13 World Wire & Cable Market for Flame Retardants 79
14 World Motor Vehicle Market for Flame Retardants 81
15 World Textiles Market for Flame Retardants 83

16 Other World Markets for Flame Retardants 85

SECTION IV -- NORTH AMERICA

1 North America -- Key Indicators for Flame Retardant Demand 89

2 North America -- Flame Retardant Demand by Product
& Market 91

3 United States -- Key Indicators for Flame Retardant Demand 94

4 United States -- Flame Retardant Demand by Product 96

5 United States -- Flame Retardant Demand by Market 98

6 Canada -- Key Indicators for Flame Retardant Demand 100

7 Canada -- Flame Retardant Demand by Product 102

8 Canada -- Flame Retardant Demand by Market 103

9 Mexico -- Key Indicators for Flame Retardant Demand 106

10 Mexico -- Flame Retardant Demand by Product 107

11 Mexico -- Flame Retardant Demand by Market 109

SECTION V -- WESTERN EUROPE

1 Western Europe -- Key Indicators for Flame Retardant Demand 111

2 Western Europe -- Flame Retardant Demand by Product
& Market 113

3 Germany -- Key Indicators for Flame Retardant Demand 116

4 Germany -- Flame Retardant Demand by Product 117

5 Germany -- Flame Retardant Demand by Market 119

6 France -- Key Indicators for Flame Retardant Demand 121

7 France -- Flame Retardant Demand by Product 123

8 France -- Flame Retardant Demand by Market 124

9 Italy -- Key Indicators for Flame Retardant Demand 127

10 Italy -- Flame Retardant Demand by Product 128

11 Italy -- Flame Retardant Demand by Market 130

12 Spain -- Key Indicators for Flame Retardant Demand 132

13 Spain -- Flame Retardant Demand by Product 133

14 Spain -- Flame Retardant Demand by Market 135

15 United Kingdom -- Key Indicators for Flame Retardant
Demand 137

16 United Kingdom -- Flame Retardant Demand by Product 139

17 United Kingdom -- Flame Retardant Demand by Market 140

18 Netherlands -- Key Indicators for Flame Retardant Demand 142

19 Netherlands -- Flame Retardant Demand by Product 143

20 Netherlands -- Flame Retardant Demand by Market 144

21 Belgium -- Key Indicators for Flame Retardant Demand 146

22 Belgium -- Flame Retardant Demand by Product 148

23 Belgium -- Flame Retardant Demand by Market 149

24 Other Western Europe -- Key Indicators for Flame Retardant
Demand 151

25 Other Western Europe -- Flame Retardant Demand by Product 152

26 Other Western Europe -- Flame Retardant Demand by Market 153

SECTION VI -- ASIA/PACIFIC

- 1 Asia/Pacific -- Key Indicators for Flame Retardant Demand 157
- 2 Asia/Pacific -- Flame Retardant Demand by Product & Market 159
- 3 China -- Key Indicators for Flame Retardant Demand 162
- 4 China -- Flame Retardant Demand by Product 165
- 5 China -- Flame Retardant Demand by Market 167
- 6 Japan -- Key Indicators for Flame Retardant Demand 170
- 7 Japan -- Flame Retardant Demand by Product 172
- 8 Japan -- Flame Retardant Demand by Market 174
- 9 South Korea -- Key Indicators for Flame Retardant Demand 177
- 10 South Korea -- Flame Retardant Demand by Product 178
- 11 South Korea -- Flame Retardant Demand by Market 180
- 12 Taiwan -- Key Indicators for Flame Retardant Demand 182
- 13 Taiwan -- Flame Retardant Demand by Product 184
- 14 Taiwan -- Flame Retardant Demand by Market 186
- 15 India -- Key Indicators for Flame Retardant Demand 188
- 16 India -- Flame Retardant Demand by Product 190
- 17 India -- Flame Retardant Demand by Market 191
- 18 Thailand -- Key Indicators for Flame Retardant Demand 193
- 19 Thailand -- Flame Retardant Demand by Product 195
- 20 Thailand -- Flame Retardant Demand by Market 196
- 21 Other Asia/Pacific -- Key Indicators for Flame Retardant Demand 198
- 22 Other Asia/Pacific -- Flame Retardant Demand by Product 199
- 23 Other Asia/Pacific -- Flame Retardant Demand by Market 200

SECTION VII -- OTHER REGIONS

- 1 Central & South America -- Key Indicators for Flame Retardant Demand 203
- 2 Central & South America -- Flame Retardant Demand by Product & Market 205
- 3 Brazil -- Key Indicators for Flame Retardant Demand 207
- 4 Brazil -- Flame Retardant Demand by Product 208
- 5 Brazil -- Flame Retardant Demand by Market 210
- 6 Other Central & South America -- Key Indicators for Flame Retardant Demand 212
- 7 Other Central & South America -- Flame Retardant Demand by Product 213
- 8 Other Central & South America -- Flame Retardant Demand by Market 215
- 9 Eastern Europe -- Key Indicators for Flame Retardant Demand 217
- 10 Eastern Europe -- Flame Retardant Demand by Product & Market 218
- 11 Russia -- Key Indicators for Flame Retardant Demand 220
- 12 Russia -- Flame Retardant Demand by Product 222
- 13 Russia -- Flame Retardant Demand by Market 223
- 14 Other Eastern Europe -- Key Indicators for Flame Retardant Demand 225
- 15 Other Eastern Europe -- Flame Retardant Demand by Product 226
- 16 Other Eastern Europe -- Flame Retardant Demand by Market 228

- 17 Africa/Mideast -- Key Indicators for Flame Retardant Demand 230
- 18 Africa/Mideast -- Flame Retardant Demand by Product 232
- 19 Africa/Mideast -- Flame Retardant Demand by Market 233

SECTION VIII -- INDUSTRY STRUCTURE

- 1 Flame Retardant Sales by Company, 2009 236
- 2 Selected Acquisitions & Divestitures 241
- 3 Selected Cooperative Agreements 246

LIST OF CHARTS

SECTION II -- MARKET ENVIRONMENT

- 1 World Insulated Wire & Cable Production by Region, 2009 26

SECTION III -- OVERVIEW

- 1 World Flame Retardant Demand by Region, 1999-2019 44

- 2 World Flame Retardant Demand by Product, 2009:

Volume Versus Value 47

- 3 World Flame Retardant Demand by Market, 2009 70

SECTION IV -- NORTH AMERICA

- 1 North America Flame Retardant Demand by Country, 2009 92

SECTION V -- WESTERN EUROPE

- 1 Western Europe Flame Retardant Demand by Country, 2009 114

SECTION VI -- ASIA/PACIFIC

- 1 Asia/Pacific Flame Retardant Demand by Country, 2009 160

SECTION VIII -- INDUSTRY STRUCTURE

- 1 World Flame Retardant Market Share by Company, 2009 237

Fax Order Form

To place an order via fax simply print this form, fill in the information below and fax the completed form to **04 37 37 15 56** . If you have any questions please visit <http://www.reportlinker.com/notify/contact>

Order Information

Please verify that the product information is correct and select the format(s) you require.

[World Flame Retardants Industry](#)

Product Formats

Please select the product formats and the quantity you require.

- 1 User License -- EUR 4 720.00 Quantity: _____
- Corporate License -- EUR 6 560.00 Quantity: _____

Contact Information

Please enter all the information below in **BLOCK CAPITALS**

Title: Mr Mrs Dr Miss Ms Prof

First Name: _____ Last Name: _____

Email Address: _____

Job Title: _____

Organization: _____

Address: _____

City: _____

Postal / Zip Code: _____

Country: _____

Phone Number: _____

Fax Number: _____

Payment Information

Please indicate the payment method, you would like to use by selecting the appropriate box.

Payment by credit card Card Number: _____

Expiry Date _____ / _____

CVV Number _____

Card Type (ex: Visa, Amex...) _____

Payment by wire transfer Crédit Mutuel

RIB : 10278 07314 00020256501 89

BIC : CMCIFR2A

IBAN : FR76 1027 8073 1400 0202 5650 189

Payment by check UBIQUICK SAS
16 rue Grenette – 69002 LYON, FRANCE

Customer signature:

Please note that by ordering from Reportlinker you are agreeing to our Terms and Conditions at
<http://www.reportlinker.com/index/terms>

Please fax this form to

04 37 37 15 56