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.

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