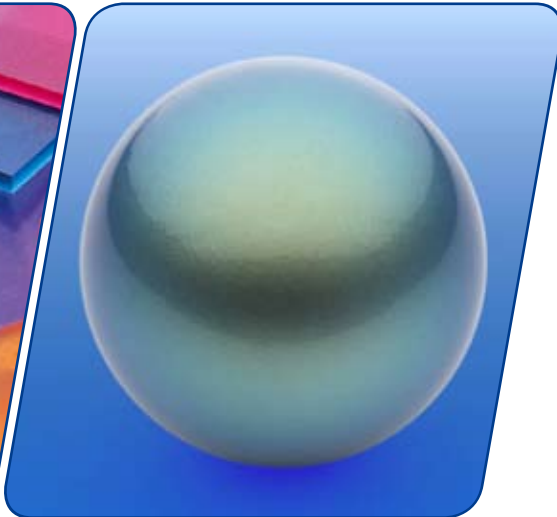
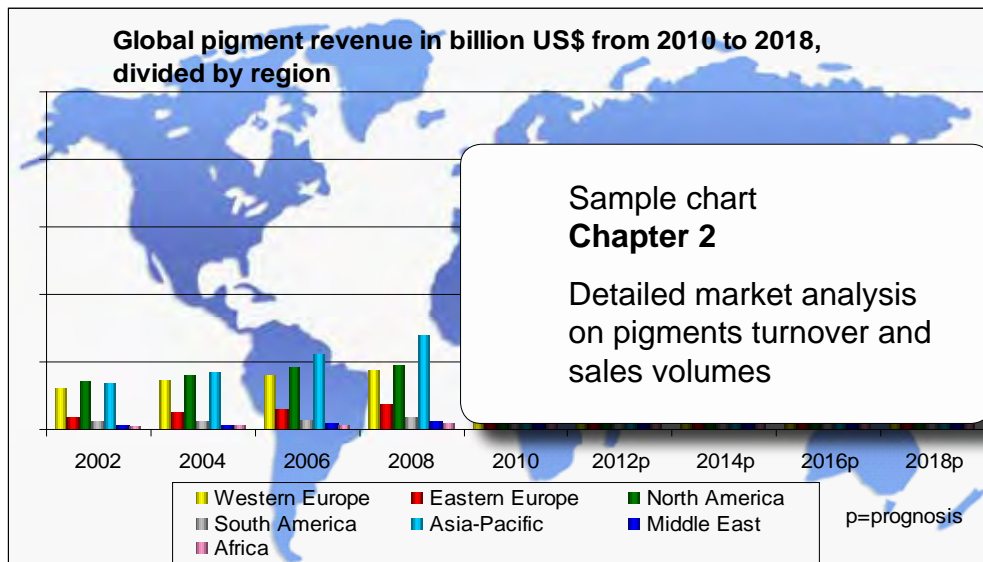


Market Study: Pigments



**Ceresana
Research**

Market Study: Pigments



Pigments have always been used primarily as colorants. However, additional properties, such as UV protection, become increasingly important when choosing a pigment. Ceresana Research forecasts that the global pigment market will earn revenues of more than US\$45 billion in 2018. In 2010, the Asia-Pacific region was the largest market area, generating about 45% of the global demand for pigments. This was followed by North America and Western Europe.

Pigments are mainly used in well established industries, such as paint and varnish manufacturing and plastics production. Demand in individual countries follows the overall economic development. The construction industry, in particular, has a strong impact on the demand for pigments. Apart from coloring construction materials such as concrete, pigments are widely used in plastic products, paints, and varnishes.

Ceresana Research expects the Asia-Pacific will continue to significantly influence market dynamics over the next years. Rapidly developing emerging markets have the greatest growth potential, above all China and India. Moreover, South America and the Middle East register above-average growth rates of 3.6% to 4.4%. Carbon Black pigments, which are used in a number of plastics, represent a strong growth market worldwide. Many emerging countries still have a low per-capita consumption of plastics,

which will, however, increase considerably over the mid-term.

The demand for different types of pigments in individual regions shows different developments. While the use of iron oxides and organic pigments records the highest growth in North America and Western Europe, other regions also see their demand for titanium dioxide and carbon black increasing significantly. We expect that titanium dioxide will have a share of somewhat more than 60% of the global pigment market in 2018. Iron oxides are used worldwide for construction materials, paints, and varnishes, but are also gaining importance for other products. For example, markets such as the food and cosmetics industry will see considerably higher growth of 3.5% annually.

Product innovations primarily aim at organic, effect, and special pigments. The focus is on higher color intensity, color variety, and additional properties, such as self-cleaning or antibacterial characteristics, or paints that reflect infrared light and offer insulating properties. Organic pigments, whose market share in volume is small, register above-average growth rates, as they benefit from rising demand from producers of printing inks, polymers, and textiles.

The Study in Brief:

Vol. I / Chapter 1 is a short and concise overview of the most important information on the different types of pigments, their classification, characteristics, raw materials, production, application areas, and environmental and health aspects.

Chapter 2 provides a presentation and analysis of the pigment market – including forecasts up to 2018: Demand divided into product types as well as revenues and prices. In addition, the study offers a comprehensive insight in the development of individual regions and global market dynamics.

Chapter 3: In-depth analysis of 18 countries: Demand for pigments and revenue as well as their influencing factors. Moreover, this chapter offers essential market data related to the individual application areas.

Chapter 4 is an analysis of the demand for pigments worldwide and in the 7 regions of the world (Western Europe, Eastern Europe, North America, South America, Asia-Pacific, the Middle East, and Africa). The fields of application include: paints and varnishes, plastics, paper, construction materials, printing inks, and others.

Vol. II is a useful list of producers: 303 profiles of pigment manufacturers – clearly arranged according to contact data, turnover, profit, product range, production sites, profile summary, fields of application, and brand names.

Table of Contents (1/3)

Volume I

1 Basics

1.1 Definition

1.1.1 Classification

1.1.2 Nomenclature

1.1.3 Important Characteristics

1.2 Types of Pigments

1.2.1 Inorganic Pigments

1.2.1.1 Inorganic White P.

1.2.1.1.1 Titanium Dioxide

1.2.1.1.2 Zinc Oxide

1.2.1.1.3 Zinc Sulfide

1.2.1.2 Inorganic Black P.

1.2.1.2.1 Carbon Black

1.2.1.2.2 Iron Oxide Black

1.2.1.2.3 Black Mixed Phase P.

1.2.1.3 Inorganic Colored P.

1.2.1.3.1 Oxides & Hydroxides

1.2.2 Organic Pigments

1.2.2.1 Azo P.

1.2.2.1.1 Monoazo P.

1.2.2.1.2 Disazo P.

1.2.2.1.3 Naphthol P.

1.2.2.1.4 Red Azo P. Lakes

1.2.2.1.5 Benzimidazolone P.

1.2.2.1.6 Disazo Condensation P.

1.2.2.1.7 Metal Complex P.

1.2.2.1.8 Isoindolinone and Isoindoline P.

1.2.2.2 Polycyclic P.

1.2.2.2.1 Phthalocyanine P.

1.2.2.2.2 Quinacridone P.

1.2.2.2.3 Perylene & Perinone

1.2.2.2.4 Diketopyrrolo-Pyrrol

1.2.2.2.5 Various Polycyclic P.

1.2.2.3 Other P.

1.2.3 Special Pigments

1.2.3.1 Magnetic P.

1.2.3.2 Anticorrosive P.

1.2.3.3 Effect P.

1.2.3.4 Transparent P.

1.2.3.5 Luminescent P.

1.3 Environmental and Health Aspects

2 Market Data

2.1 World

2.1.1 Demand

2.1.2 Revenues and Prices

2.1.3 Demand divided by types of pigments

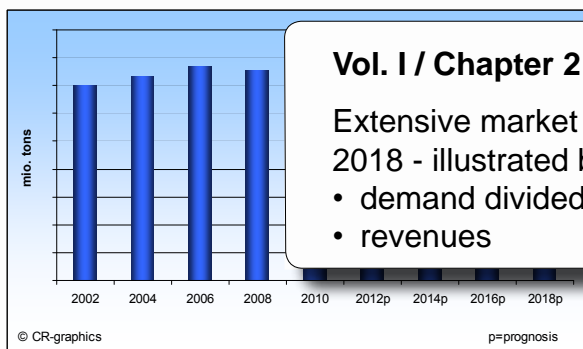
2.1.4 Market Dynamics

2.2.1 Demand – Western Europe

The demand for pigments in Western Europe totaled about X million tonnes in the year 2002 (Graph). This had grown to X million tonnes by 2007, before it fell to X million tonnes during the following three years. We expect demand in Western Europe will slightly increase by 2018. Demand is anticipated to rise by X% per year to approximately X million tonnes in 2018. In 2010, the largest share of West European demand for pigments was accounted for by Germany with X%, followed by Italy and France (Table).

Country	Share in 2002	Share in 2010	Share in 2018p
Germany	x	x	x
Italy	x	x	x
France	x	x	x
United Kingdom	x	x	x
Spain	x	x	x
Other countries	x	x	x
Total	100%	100%	100%

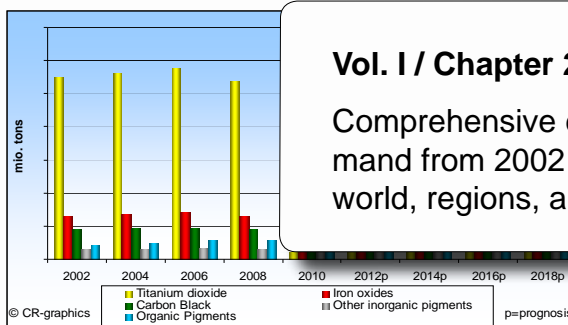
Table: Various countries' shares in West European demand for pigments from 2002 to 2018



Graph: Demand for pigments in Western Europe from 2002 to 2018

2.4.3 Demand divided by types of pigments – North America

Titanium dioxide is the most widely used pigment in North America. Demand for this pigment in North America totaled about X million tonnes in 2010 (Graph). After collapses in the past years, demand for titanium dioxide will most likely recover between 2010 and 2018. We forecast demand will rise at an average of X% per year during this time. The use of iron oxides is expected to increase even more. They are the second most common pigments in North America. Following annual growth rates of X%, the share of iron oxides will rise by X percentage points to X% over the next eight years. Between 2002 and 2010, organic pigments were the only pigments that registered average positive growth rates in North America. We expect the demand for organic pigments will increase by X% annually until 2018 – the highest growth rate in North America.



Graph: Demand for pigments in North America from 2002 to 2018 – divided by types of pigments

Pigment	Share in 2002	Share in 2010	Share in 2018p
Titanium dioxide	x	x	x
Iron oxide	x	x	x
Carbon black	x	x	x
Other inorganic pigments	x	x	x
Organic pigments	x	x	x
Total	100%	100%	100%

Table: Shares in North American demand for pigments between 2002 and 2018, divided by pigments

Table of Contents (2/3)

- 2.2 Western Europe
- 2.3 Eastern Europe
- 2.4 North America
- 2.5 South America
- 2.6 Asia-Pacific
- 2.7 Middle East
- 2.8 Africa

3 Country Profiles

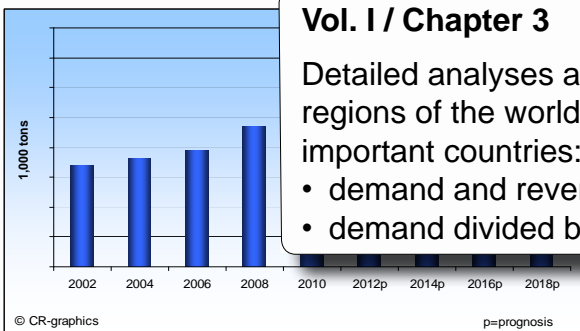
- 3.1 Western Europe
 - 3.1.1 France
 - 3.1.2 Germany
 - 3.1.3 Italy
 - 3.1.4 Spain
 - 3.1.5 United Kingdom
 - 3.1.6 Rest of Western Europe
- 3.2 Eastern Europe
 - 3.2.1 Poland
 - 3.2.2 Russia
 - 3.2.3 Turkey
 - 3.2.4 Rest of Eastern Europe
- 3.3 North America
 - 3.3.1 Canada
 - 3.3.2 Mexico
 - 3.3.3 USA
- 3.4 South America
 - 3.4.1 Argentina
 - 3.4.2 Brazil
 - 3.4.3 Rest of South America
- 3.5 Asia-Pacific
 - 3.5.1 China
 - 3.5.2 India
 - 3.5.3 Japan
 - 3.5.4 South Korea
 - 3.5.5 Taiwan
 - 3.5.6 Rest of Asia-Pacific

4 Market Data Applications

- 4.1 World
 - 4.1.1 Paints and Varnishes
 - 4.1.2 Plastics
 - 4.1.3 Paper
 - 4.1.4 Construction materials
 - 4.1.5 Printing inks
 - 4.1.6 Others
- 4.2 Western Europe
- 4.3 Eastern Europe
- 4.4 North America
- 4.5 South America
- 4.6 Asia-Pacific
- 4.7 Middle East
- 4.8 Africa

3.4.2 Brazil

Demand for pigments in Brazil totaled about X tonnes in 2002 (Graph). This total rose to X tonnes by 2010. Accordingly, Brazil accounted for approximately X% of South American demand for pigments. Demand for pigments in Brazil will most likely see very high growth when compared internationally. The booming construction industry in Brazil has an increasing demand for construction products. This is mostly influenced by the plastic industry, which profits from increased affluence among the population, and a more stable economic situation. This development mainly applies to paints/varnishes and plastics. Almost X% of all pigments were used for these products in 2010 (Table). We anticipate the demand for pigments used in paints and varnishes will increase at an average of X% per year. This is followed by plastics with annual growth rates of X%. Both segments are expected to see their shares increase to X% and X% respectively.



Graph: Demand for pigments in Brazil from 2000 to 2018

Company	Titanium dioxide	Zinc oxides	Carbon black	Oxides & Hydroxides	Iron oxides	Chromate	Azo pigments	Polycyclic	Effect pigments	Others
X									x	Gold, silver, aluminum, metal effects
X		x								
X	x			x	x	x			x	Pearlescent
X	x			x	x				x	Pearlescent

Table: Brazilian pigment manufacturers and their product base

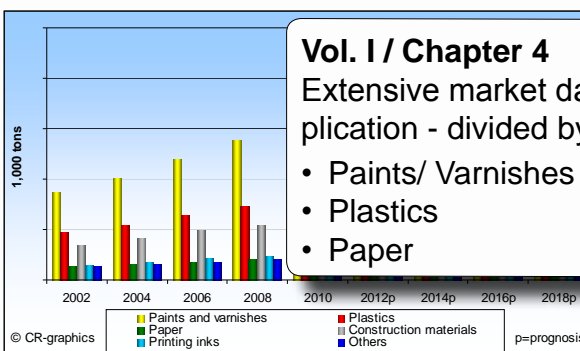
Vol. I / Chapter 3

Detailed analyses and forecasts for the 7 regions of the world, mainly for the 18 most important countries:

- demand and revenue
- demand divided by pigment types

4.6 Market Data Applications – Asia-Pacific

Total demand for pigments in the Asia-Pacific region amounted to X million tonnes in 2010, whereof the processing into paints and varnishes had the largest share (Graph). All in all, about X million tonnes of pigments were utilized in the Asia-Pacific, which corresponds to X% of the entire market. Demand for pigments used to produce plastics was the second-largest market with a X% share, followed by construction materials (X%), printing inks (X%), and paper (X%). We expect Asian-Pacific demand for pigments will increase at an average annual rate of X% over the next eight years, resulting in a market volume of X million tonnes in 2018.



Graph: Demand for pigments in the Asia-Pacific from 2002 to 2018, divided by application

Vol. I / Chapter 4

Extensive market data on the fields of application - divided by the 7 world regions:

- Paints/ Varnishes
- Plastics
- Paper
- Construction
- Printing inks
- Others

In the Asia-Pacific region, the use of pigments for paints and varnishes rose from X million tonnes in 2002 to more than X million tonnes in 2010 (Graph). China accounted for approximately X% of this demand in 2010 (Table). We forecast China and India will see the greatest growth rates of about X% annually over the next eight years. Both countries will be able to expand their shares by X and X percentage points, respectively, until 2018. Ceresana anticipates demand in the Asia-Pacific will increase at an average of X% annually over the upcoming eight years, resulting in a market volume of approximately X million tonnes in 2018.

Table of Contents (3/3)

Volume II

5 Company Profiles

- 5.1 Western Europe
 - Austria (2 Producers)
 - Belgium (3)
 - Finland (1)
 - France (5)
 - Germany (17)
 - Italy (4)
 - Luxembourg (1)
 - Norway (1)
 - Spain (2)
 - Sweden (2)
 - Switzerland (3)
 - The Netherlands (3)
 - United Kingdom (6)
- 5.2 Eastern Europe
 - Croatia (1)
 - Cyprus (1)
 - Czechia (1)
 - Poland (3)
 - Romania (1)
 - Russia (4)
 - Slovenia (1)
 - Turkey (1)
 - Ukraine (4)
- 5.3 North America
 - Canada (2)
 - Mexico (4)
 - USA (28)
- 5.4 South America
 - Argentina (2)
 - Brazil (4)
- 5.5 Asia Pacific
 - Australia (4)
 - China (105)
 - Hong Kong (2)
 - India (45)
 - Indonesia (1)
 - Japan (18)
 - Malaysia (1)
 - South Korea (8)
 - Taiwan (6)
 - Vietnam (1)
- 5.6 Middle East
 - Iran (1)
 - Pakistan (1)
 - Saudi Arabia (1)
- 5.7 Africa
 - South Africa (2)

Heubach GmbH		
Heubachstr. 7		
38685 Langelsheim		
Germany		
Tel.	49 5326 52 0	
Fax	49 5326 52 213	
Web	www.heubachcolor.de	
E-Mail	sales@heubachcolor.de	
Financial Key Data		
	2007	2008
Turnover		
Profit		
Divisions, Product Range	The product portfolio includes anticorrosive pigments as well as varnishes, plastics, coatings, ink	
Production Sites	The company's production sites are: <ul style="list-style-type: none"> • Langelsheim, Germany • Ankleshwar, India • Fairless Hills, USA • Hangzhou, China 	
Profile Summary	The Heubach GmbH is a producer of pigments, anticorrosive pigments. German plant is ISO 9001:2008 certified. Indian facility are certified according to ISO 14001:2004, OHSAS 18001:2007, and ISO 9001:2008.	

Vol. II / Chapter 5

Extensive company profiles for 303 manufacturers, as for example BASF, Cabot, China Synthetic Rubber, Clariant International, Cristal Global, Dainichiseika Color & Chemicals, DIC, Dimachema Pigment, EI DuPont De Nemours, Evonik Carbon Black, Heubach, Huntsman International, Ishihara Sangyo Kaisha, Kemira, KRONOS Worldwide, Lanxess, Merck, OCI Company, Rockwood Holdings, Sudarshan Chemical Industries, Tokai Carbon and Tronox.

Note: The profiles are assigned to the country in which the company or holding is headquartered. Company profiles also include JVs and subsidiaries.

Inorganic pigments		
<input type="checkbox"/> Titanium dioxide	<input type="checkbox"/> Zinc oxide	<input type="checkbox"/> Chromate
<input type="checkbox"/> Carbon Black	<input type="checkbox"/> Black iron oxide	<input checked="" type="checkbox"/> Hydroxy Cobalt
<input checked="" type="checkbox"/> Bismuth	<input type="checkbox"/> Cadmium	<input checked="" type="checkbox"/> Mixed phosphates
Organic pigments		
<input checked="" type="checkbox"/> Polycyclic	<input checked="" type="checkbox"/> Phthalocyanine	<input type="checkbox"/> Perylen & Perino
<input checked="" type="checkbox"/> Azo	<input checked="" type="checkbox"/> Naphthol	<input checked="" type="checkbox"/> Quinacridone, anthanthrone
Special pigments		
<input type="checkbox"/> Magnetic	<input checked="" type="checkbox"/> Protection	<input type="checkbox"/> Pearlescent
<input type="checkbox"/> Metal		
Fields of Application		
<input checked="" type="checkbox"/> Paints & Varnishes	<input checked="" type="checkbox"/> Plastics	<input checked="" type="checkbox"/> Textiles
<input checked="" type="checkbox"/> Printing inks	<input checked="" type="checkbox"/> Ceramic & Glass	<input checked="" type="checkbox"/> Paper
<input type="checkbox"/> Cosmetics	<input type="checkbox"/> Elastomers	<input checked="" type="checkbox"/> Other
Pigments (C.I.), Applications		Brand Name
Organic pigments (several C.I.'s) for varnishes, inks, and plastics		MONOLITE, MONOCHROME, VYNAMON
Inorganic pigments (several C.I.'s) for paints, varnishes, plastics, and construction materials		HEUCODUR, HEUCODUR IR
Pigment preparations (several grades) for paints, varnishes, plastics, and inks		TICO, HEUCOFIT, HEUCOSIN, HEUCOFLOOR, HEUCOBATCH, HEUCOPLAST, HEUCOSPERSE, MICROSPERSE Plus
Color mixing systems (universal and water-based) for in-plant and POS appli-		HEUCOTINT, AQUIS

Vol. II / Chapter 5

Clearly arranged data and facts on the most important producers and niche manufacturers:

- Contact details
- Turnover and earnings
- Product range
- Production sites
- Profile summary
- Product basis and fields of application
- Pigment types, applications, and brand names

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Several 1,000 companies, institutions, and associations from more than 45 countries have already profited from our global market data and prognoses.

This study is especially useful for:

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- Companies from the fields of paints and varnishes, coatings, plastics, elastomers, paper and paperboard, construction materials, printing inks, ceramics, enamel, textiles, leathers, and synthetic fibers
- Investors and analysts
- Authorities and organizations
- Associations and institutes
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