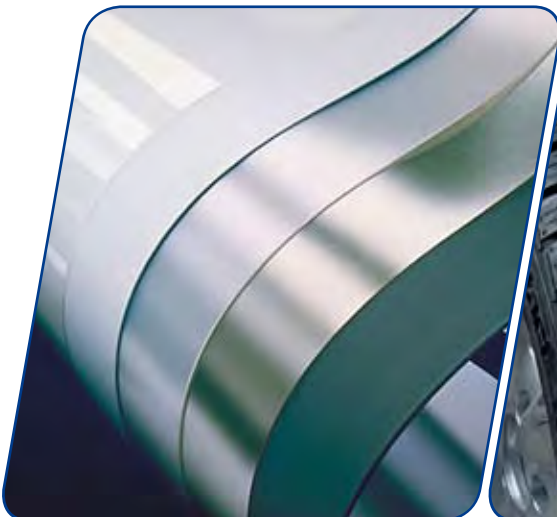
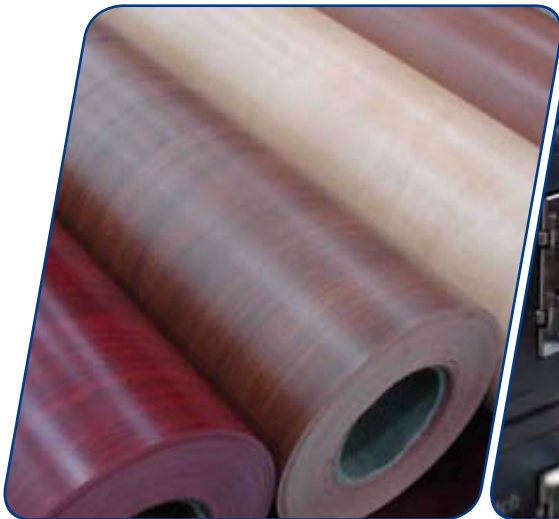
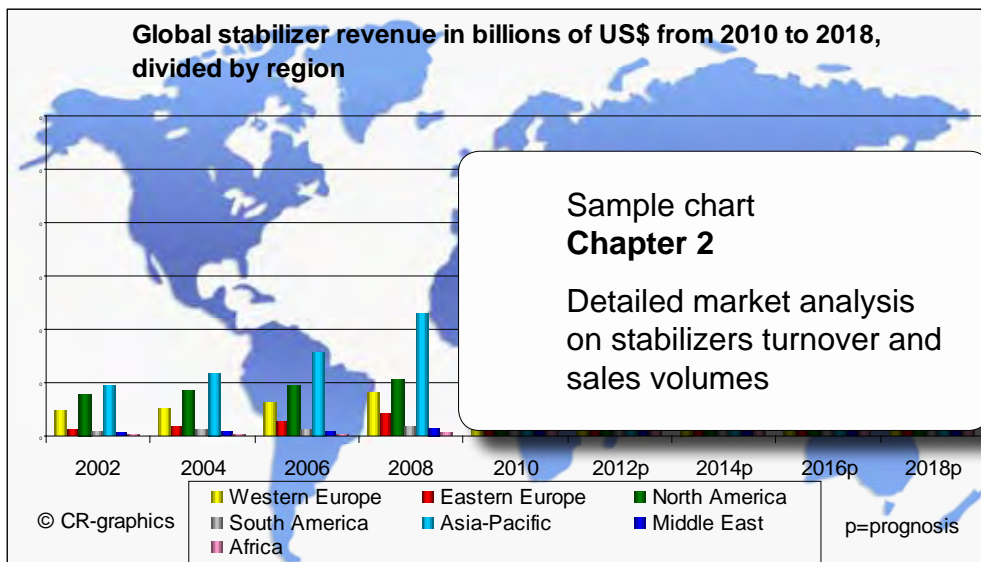


# Market Study: Stabilizers



**Ceresana  
Research**

# Market Study: Stabilizers



Stabilizers protect plastics from degradation when exposed to heat and light. The market research institute Ceresana Research expects the global market for these indispensable additives will achieve revenues of almost US\$4.8 billion by 2018. In 2010, the Asia-Pacific region represented the largest market with a roughly 50% share in global demand for stabilizers, followed by Western Europe and North America.

Demand for stabilizers depends on the development of the plastics industry, especially the field of polyvinyl chloride (PVC). As heat stabilizers are mainly used in PVC products used in construction, the construction industry in individual countries has a huge impact on demand. Most important sales markets during the past year included profiles, pipes, and cables – more than 85% of all stabilizers were used in these fields.

Ceresana forecasts that the Asia-Pacific will continue to have a major influence on market dynamics over the upcoming years. Moreover, South America, Eastern Europe, and the Middle East record above-average growth rates of 3.5% to 4.7%. Light stabilizers constitute a quickly growing market worldwide. Especially the demand for HALS

(Hindered Amine Light Stabilizers) used in products made from polypropylene and polyethylene will see considerable increases during next years. In addition, organic stabilizers, which used to have a small share, record dynamic development.

There will be significant changes in the types of stabilizers used in different countries. Lead stabilizers will be increasingly replaced by other types of stabilizers, especially in Europe, and will therefore lose their top position to mixed metals. On the other hand, the use of lead stabilizers continues to grow in China and India. We expect that mixed metals will have a 38.5% share in the global stabilizer market in 2018. Calcium-zinc stabilizers are used in profiles and cable protection, but are gaining importance for other products, e.g. pipes, food films, and packaging. Barium-zinc stabilizers see the greatest increases in demand in the field of floorings.

## The Study in Brief:

**Vol. I / Chapter 1** is a concise overview of the different types of heat stabilizers and light stabilizers. In addition, this chapter offers the most important information on raw materials, environmental and health issues,

application areas, and legal situation.

Chapter 2 provides a presentation and analysis of the stabilizer market – including forecasts until 2018: demand divided into product types as well as revenues. In addition, this chapter offers a comprehensive insight in the development of individual regions and global market dynamics.

In chapter 3, 17 countries are analyzed in detail: Demand for stabilizers, revenues as well as their influencing factors, and essential market data related to the individual application areas.

Chapter 4 offers an analysis of the demand for stabilizers worldwide and in the 7 regions of the world (Western Europe, Eastern Europe, North America, South America, Asia-Pacific, Middle East, and Africa). Fields of application include pipes, profiles, films, cables, floorings, other plastic products, and elastomers.

Vol. II is a useful list of manufacturers: 149 profiles of stabilizer producers – clearly arranged according to contact data, turnover and profit, product range, production sites, profile summary, product types, product basis, fields of application, and brand names.

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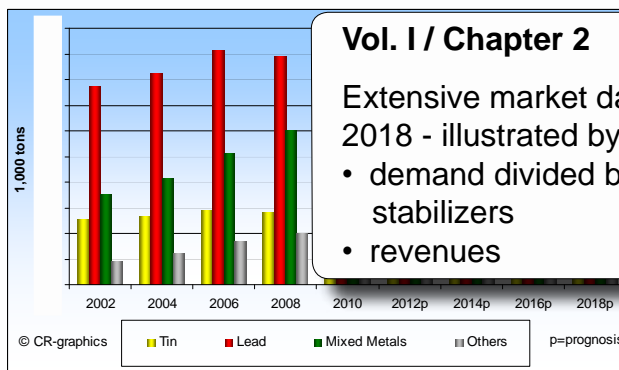
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2.1.3 Demand divided by types of stabilizer – World

With a global demand for X tonnes, lead stabilizers were the most widely used stabilizers in 2010 (Graph). Mixed metals accounted for X tonnes of worldwide demand, followed by tin stabilizers (X tonnes) and other stabilizers (X tonnes).



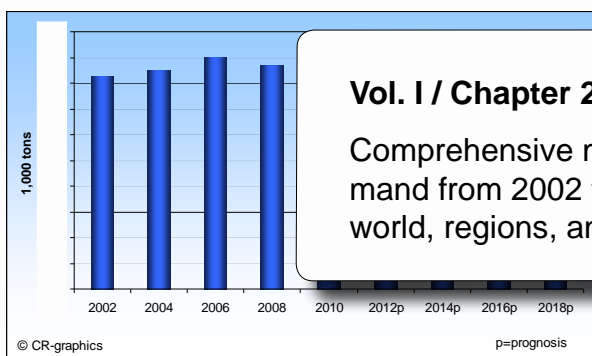
Graph: Global demand for stabilizers from 2002 to 2018 – divided by types of stabilizer

	Share in 2002	Share in 2010	Share in 2018p
Tin	X	X	X
Lead	X	X	X
Mixed metals	X	X	X
Other stabilizers	X	X	X
<b>Total</b>	100%	100%	100%

Table: Shares in global demand for stabilizers from 2002 to 2018, divided by products

2.2.1 Demand and Revenue – Western Europe

Demand for stabilizers in Western Europe amounted to approx. X tonnes in 2002 (Graph). This rose to X tonnes by 2007 and then fell to X tonnes during the following three years. In 2010, the largest share of West European stabilizer consumption was accounted for by Germany with X%, followed by Italy and Great Britain (Table).



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

Country	Share in 2002	Share in 2010	Share in 2018p
Germany	X	X	X
Italy	X	X	X
United Kingdom	X	X	X
France	X	X	X
Spain	X	X	X
Others	X	X	X
<b>Total</b>	100%	100%	100%

Table: Various countries' shares in Western European demand for stabilizers from 2002 to 2018

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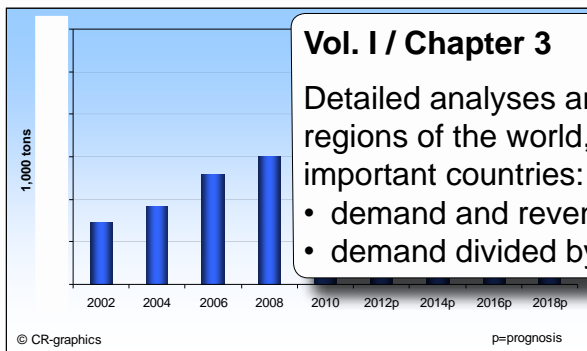
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3.5.1 China

In 2002, demand for stabilizers in China totaled X tonnes (Graph). Demand could be increased steadily to X million tonnes by 2010, following an average annual growth of X%. In China, X tonnes of stabilizers were used to manufacture profiles (Table). With an X% share, profiles were shortly ahead of pipes (X% share).



Vol. I / Chapter 3

Detailed analyses and forecasts for the 7 regions of the world, mainly for the 17 most important countries:

- demand and revenue
- demand divided by stabilizers types

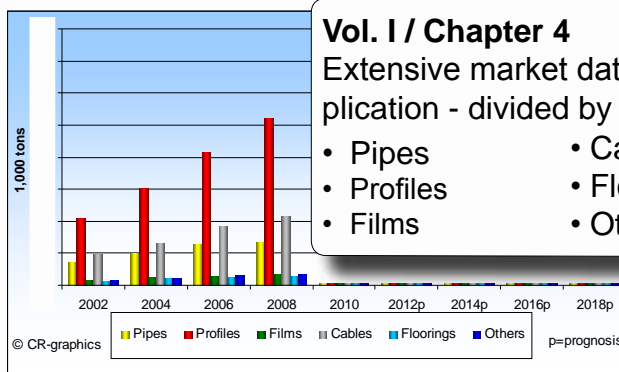
Graph: Demand for stabilizers in China from 2002 to 2018

in 1,000 tonnes	2002	2004	2006	2008	2010	2012p	2014p	2016p	2018p
Pipes	x	x	x	x	x	x	x	x	x
Profiles	x	x	x	x	x	x	x	x	x
Films	x	x	x	x	x	x	x	x	x
Cables	x	x	x	x	x	x	x	x	x
Floorings	x	x	x	x	x	x	x	x	x
Others	x	x	x	x	x	x	x	x	x
<b>Total</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>

Table: Demand for stabilizers in China from 2002 to 2018, divided by application

4.3 Eastern Europe – Applications

Demand for stabilizers in Eastern Europe amounted to X tonnes in 2010 (Graph). With X%, the production of plastic profiles had the largest share of demand in Eastern Europe. Cables came in second place with an X% share, followed by pipes (X%), films (X%), floorings (X%), and other applications (X%). We anticipate demand will climb to X tonnes by 2018. This translates to an average increase of X% annually.



Vol. I / Chapter 4

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

- Pipes
- Profiles
- Films
- Cables
- Floorings
- Others

Graph: Demand for stabilizers in Eastern Europe from 2002 to 2018, divided by application

4.3.1 Eastern Europe – Pipes

Demand for stabilizers by pipe manufacturers rose at an average annual rate of X% over the past eight years and totaled X tonnes in 2010. This is expected to grow by X% per year by 2018, resulting in a market volume of X million tonnes. With about X%, Turkey had the largest share of Eastern European demand for stabilizers in this category during 2010, followed by Poland and Russia.

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Vol. II / Chapter 5

Extensive company profiles for the biggest 149 manufacturers, as for example Air Products & Chemical, Akzo Nobel, Arkema, Baerlocher, BASF, Chemson Polymer - Additive, Clariant International, Cytec Industries, DIC, Dow Chemical, DuPont, Galata Chemicals, Lanxess, Songwon Industrial, Sumitomo Chemical.

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

<b>Songwon Industrial Co., Ltd.</b>			
737-2 Yochon-dong			
680-090 Nam-gu, Ulsan			
South Korea			
Tel.	82 52 273 9841		
Fax	82 52 272 3528		
Web	www.songwonind.com		
E-Mail	info@songwonind.com		
<b>Financial Key Data</b>			
(in billion KRW)	2007	2008	
Turnover	248	370	
EBITDA	63.5	38.5	
Divisions, Product Range	The company's principal activity is products. The product portfolio includes monomers, stabilizers, organo-tin polyester diol, polyurethanes, super acrylic foam tape, and plasticizers.		
Production Sites	The company's production sites are located in: <ul style="list-style-type: none"> <li>• Ulsan, South Korea</li> <li>• Suwon, South Korea</li> </ul>		
Profile Summary	Songwon, established in 1965, is headquartered in Ulsan, South Korea. Initially, the company produced PVC stabilizers. In 1977, the firm went public and has been listed on the Korea Exchange (KRX) since then. In 2008, Songwon and Nitto Kasei Co., Ltd. formed a strategic cooperation. Songwon founded a representative-office in Bahrain in 2009 and established affiliates in Hong Kong, India, and China during 2010. Further affiliates are located in Friendswood, US,		

Vol. II / Chapter 5

Clearly arranged data and facts on 149 manufacturers:

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

for America, and in Frauenfeld, Switzerland, for The company's environmental management according to ISO 14001.			
<b>Stabilizers</b>			
Product-Types	<input checked="" type="checkbox"/> Heat-Stabilizer	<input checked="" type="checkbox"/> UV-Stabilizer	<input type="checkbox"/>
Product Basis	<input type="checkbox"/> Lead	<input type="checkbox"/> Magnesium	
	<input type="checkbox"/> Barium-Zinc	<input type="checkbox"/> Zinc	
	<input checked="" type="checkbox"/> Calcium-Zinc	<input type="checkbox"/> Aluminum	
	<input checked="" type="checkbox"/> Tin	<input type="checkbox"/> Cadmium	
	<input checked="" type="checkbox"/> Others: Mixed metal	<input checked="" type="checkbox"/> Others: Heavy metal	<input type="checkbox"/> Others:
<b>Fields of Application</b>			
<input checked="" type="checkbox"/> PVC	<input checked="" type="checkbox"/> PE	<input checked="" type="checkbox"/> PP	
<input checked="" type="checkbox"/> PS	<input type="checkbox"/> Foam	<input checked="" type="checkbox"/> Elastomer	
<input checked="" type="checkbox"/> ABS	<input checked="" type="checkbox"/> Polyester	<input checked="" type="checkbox"/> Others: PU	
<b>Stabilizer, Applications, Combination</b>			<b>Brand Name</b>
Stabilizer for floorings, deco films, artificial leather, wall papers, sol coatings, flexible extrusions, electric wires, food contact applications, rigid films, pipes, fittings, automotives, window profiles, and catalysts			Songstab
Light stabilizer for most elastomers			Songlight

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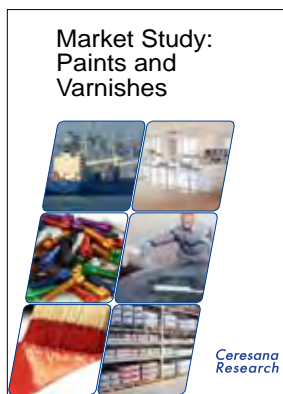
- Producers, traders and clients of light and heat stabilizers, lead stabilizers, mixed metals, calcium-zinc, barium-zinc, tin and cadmium-stabilizers as well as HALS
- Manufacturers and processors of pipes, profiles, films, cables, floorings, medical products, toys, textiles and elastomers
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- Purchasing
- Import / export



**Stabilizers**  
11 Products; 149 Producers; 538 Pages, 106 Graphs, 121 Tables; 05/11



**Plasticizers (new)**  
19 Products; 213 Producers; 842 Pages, 188 Graphs, 134 Tables; 05/11



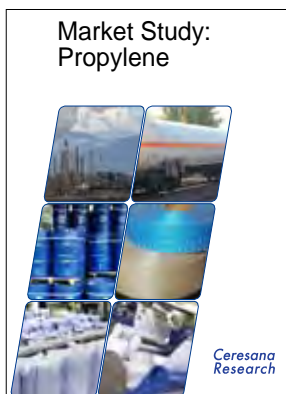
**Paints and Varnishes**  
30 Countries, 138 Producers; 2 Vol., 575 P., 129 Graphs, 56 Tables; 04/11



**Adhesives**  
31 Countries, 199 Producers; 2 Vol., 870 P., 133 Graphs, 48 Tables; 03/11



**Plastic Pipes**  
30 Countries, 135 Producers; 2 Vol., 590 P., 131 Graphs, 101 Tables; 03/11



**Propylene**  
51 Countries, 137 Producers; 2 Vol., 760 P., 257 Graphs, 137 Tables; 01/11



**Ethylene**  
55 Countries, 117 Producers; 2 Vol., 801 P., 288 Graphs, 191 Tables; 12/10



**Plastic Caps**  
31 Countries, 379 Producers; 2 Vol., 1,100 P., 139 Graphs, 72 Tables; 09/10

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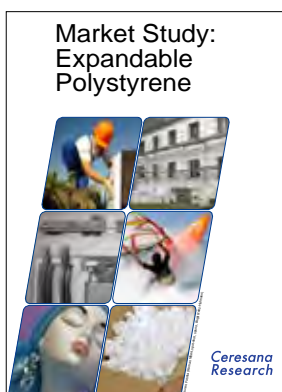
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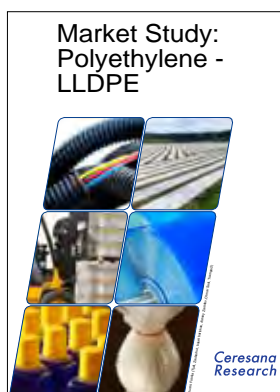
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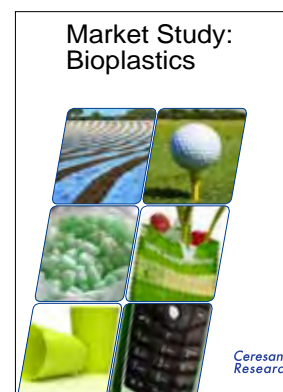
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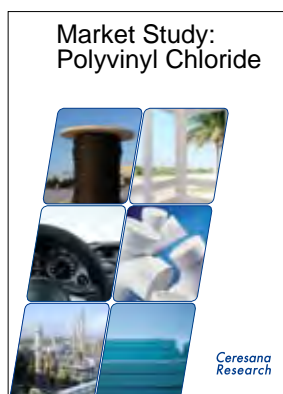
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### Bioplastics

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### Polyvinyl Chloride

61 Countries, 122 Producers; 2 Vol., 977 P., 364 Graphs, 108 Tables; 11/08



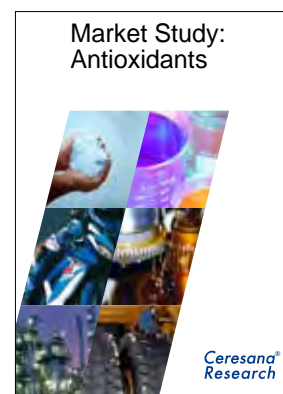
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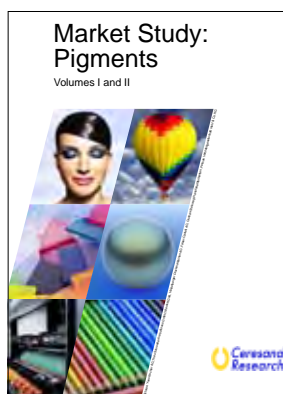
### Polypropylene

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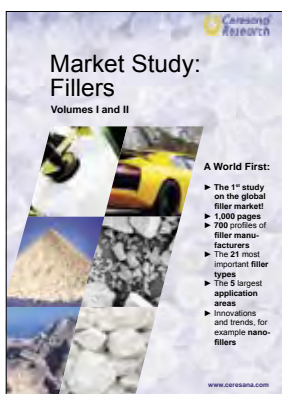
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