Market Study: Titanium Dioxide (3rd ed.)
Dear decision-makers,

our studies provide you with the reliable data and forecasts that enable a secured strategic planning for your company. Our proven expertise as well as country-specific and global analyses supply the basis for your market success. Thus, you can strengthen your competitive position even in the face of increasing market dynamics!

Our experienced team of experts uses profound industry knowledge. We conduct primary and secondary research by means of objective surveys, analyses, forecasts, and preparation of relevant data. With 160 market studies, Ceresana is one of the globally leading market research institutes for the industrial sector.

Our market expertise supports you in reaching your goals:

Get a better understanding of the market!

How does the global market develop?
Where are potential future markets?
Where are opportunities and risks?
How high is the market growth per country?
What are the current economic, political, and industry-specific trends?

Keep the focus on competition!

What do competitors offer their clients?
Are there product innovations?
Where are new market entries or M&A?
How are competitors positioned?

Thoroughly analyze your value chain!

Where do ideal procurement, production, and sales conditions prevail?
What are the most important market actors?
Are imports or exports advisable?
Who are the possible business partners for cooperations?

Identify demand and customers!

What are possible application areas?
Who are the most important customers?
Where are further target groups?
What is the trend of demand?
Introduction

The market research company Ceresana analyzed the global market for titanium dioxide (TiO2) along its whole value-added chain already for the third time. The most important natural resources for titanium dioxide are the minerals ilmenite and rutile. Ilmenite producers gain it from ore deposits or from sand that contains heavy metals. Natural rutile is formed primarily by the crystallization of magma with high titanium and low iron contents or by the metamorphism of titanium-bearing sediments or magmatites. Synthetic rutile and titanium slag are made from ilmenite.

Titanium Dioxide Uses

In 2017, more than 15 million tonnes of ilmenite, rutile, and titanium slag were processed worldwide. About 60% thereof were utilized for the production of pigments. For other end products, such as technically pure titanium, electrical conductors, and chemical intermediates, about 7% were utilized. The rest, about 33% were used for further refinement into synthetic rutile and titanium slag.

Titanium Dioxide Pigments

While only a few countries dominate the market for these feedstocks, the processors in Asia-Pacific, North America, and Western Europe determine the demand. The new titanium dioxide market report by Ceresana analyzes the global market for TiO2 pigments in detail. The industry in Asia-Pacific accounted for almost 46% of global demand in 2017. North America and Western Europe followed with almost 17% respectively. The most important sales markets for TiO2 pigments are paints and coatings with a market share of over 56%, followed by plastics, paper, and other pigment applications, for example food and sunscreen.
The Study in Brief

Chapter 1 provides an analysis of the global market for titanium dioxide feedstock: from the naturally occurring raw materials ilmenite and rutile to the intermediates titanium slag and synthetic rutile up to their applications. Information is given on revenues, capacities, trade, and production per product type. Furthermore, feedstock demand is split by the segments pigment production, other uses, and the volume processed into intermediates such as titanium slag and synthetic rutile.

Chapter 2 deals with the most important TiO2 market: pigments. Data are given on development of revenues, demand, and products – including forecasts up to 2025.

In chapter 3, information on the market for TiO2 pigments is provided for the 15 most important countries. Besides import, export, supply, and demand, utilization of pigments in the respective sales markets is analyzed as well.

Chapter 4 examines the application areas of titanium dioxide pigments: paints and coatings, paper, plastics, and other applications. The several sales markets are thoroughly examined – split by Western Europe, Eastern Europe, North America, South America, Asia-Pacific, and the Middle East / Africa. The largest countries are analyzed individually.

Chapter 5 provides profiles of the largest manufacturers of titanium dioxide pigments as well as of the producers of ilmenite, natural and synthetic rutile, and titanium slag – clearly arranged according to contact details, turnover, profit, product range, production sites, capacities, and profile summary. Extensive profiles of 73 producers are given, including Chemours, Iluka, Group DF, Kenmare, Kronos, Rio Tinto, Tronox, TiZir, and Venator.
Key Figures of the Study

The following table provides an overview of all figures included in this study, referring to the years 2009 to 2025. A check mark was put for each region and country (country code according to ISO-3166 Alpha-2) as well as for the world as a whole if the figures are included. Revenues are indicated in euros and US-dollars, demand and production volume as well as trade figures in metric tonnes.

<table>
<thead>
<tr>
<th>Key Figures</th>
<th>Western Europe</th>
<th>Eastern Europe</th>
<th>North America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1:</td>
<td></td>
<td></td>
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<tr>
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<tr>
<td>Demand per Type:</td>
<td>Ilmenite</td>
<td>Rutile</td>
<td>Titanium Slag</td>
</tr>
<tr>
<td>Demand per Application:</td>
<td>Pigments</td>
<td>Other Applications</td>
<td>Synthetic Rutile / Titanium Slag</td>
</tr>
<tr>
<td>Total Production per Type:</td>
<td>Ilmenite</td>
<td>Rutile</td>
<td>Titanium Slag</td>
</tr>
<tr>
<td>Chapter 2-4:</td>
<td></td>
<td></td>
<td></td>
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<td>Revenues</td>
<td>Total DE FR UK IT NO ES Other Total PL RU UA Other Total CA MX US</td>
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<tr>
<td>Import and Export</td>
<td>Total</td>
<td></td>
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</tr>
<tr>
<td>Demand per Application:</td>
<td>Paints &amp; Coatings</td>
<td>Paper</td>
<td>Plastics</td>
</tr>
<tr>
<td>Other Applications</td>
<td>Total</td>
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<td>Total Production</td>
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<thead>
<tr>
<th>Key Figures</th>
<th>South America</th>
<th>Asia-Pacific</th>
<th>Middle East / Africa</th>
<th>World</th>
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<tbody>
<tr>
<td>Chapter 1:</td>
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<td></td>
<td></td>
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<td>Titanium Slag</td>
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<td></td>
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<td>Ilmenite</td>
<td>Rutile</td>
<td>Titanium Slag</td>
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<td>Revenues</td>
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<td>Total</td>
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<td></td>
</tr>
</tbody>
</table>
Table of Contents (1/2)

1 Market Data: Ilmenite, Rutile & Titanium Slag – World & Regions

1.1 World
  1.1.1 Demand
  1.1.2 Revenues
  1.1.3 Production

1.2 Western Europe
  1.2.1 France
  1.2.2 Germany
  1.2.3 Italy
  1.2.4 Norway
  1.2.5 Spain
  1.2.6 United Kingdom
  1.2.7 Other Western Europe

1.3 Eastern Europe
  1.3.1 Poland
  1.3.2 Russia
  1.3.3 Ukraine
  1.3.4 Other Eastern Europe

1.4 North America
  1.4.1 Canada
  1.4.2 Mexico
  1.4.3 USA

1.5 South America
  1.5.1 Brasil
  1.5.2 Other South America

1.6 Asia-Pacific
  1.6.1 Australia
  1.6.2 China
  1.6.3 India
  1.6.4 Japan
  1.6.5 South Korea
  1.6.6 Other Asia-Pacific

1.7 Middle East / Africa
  1.7.1 Middle East
  1.7.2 South Africa
  1.7.3 Other Africa

2 Market Data: Titanium Dioxide Pigments – World & Regions

2.1 World
  2.1.1 Demand
  2.1.2 Revenues
  2.1.3 Production

2.2 Western Europe
  2.2.1 Demand and Revenues
  2.2.2 Production

2.3 Eastern Europe
  2.3.1 Demand and Revenues
  2.3.2 Production

2.4 North America
  2.4.1 Demand and Revenues
  2.4.2 Production

2.5 South America
  2.5.1 Demand and Revenues
  2.5.2 Production

2.6 Asia-Pacific
  2.6.1 Demand and Revenues
  2.6.2 Production

2.7 Middle East / Africa
  2.7.1 Demand and Revenues
  2.7.2 Production

3 TiO2 Pigments – Countries

3.1 Western Europe
  3.1.1 France
    3.1.1.1 Demand and Revenues
    3.1.1.2 Production, Capacities & Trade
  3.1.2 Germany
    3.1.2.1 Demand and Revenues
    3.1.2.2 Production, Capacities & Trade
  3.1.3 Italy
    3.1.3.1 Demand and Revenues
    3.1.3.2 Production, Capacities & Trade
  3.1.4 Spain
    3.1.4.1 Demand and Revenues
    3.1.4.2 Production, Capacities & Trade
  3.1.5 Spanien
  3.1.6 United Kingdom
    3.1.6.1 Demand and Revenues
    3.1.6.2 Production, Capacities & Trade
Table of Contents (2/2)

3.2 Eastern Europe  
3.2.1 Poland  
3.2.1.1 Demand and Revenues  
3.2.1.2 Production, Capacities & Trade  
3.2.2 Russia  
3.2.2.1 Demand and Revenues  
3.2.2.2 Production, Capacities & Trade  
3.2.3 Other Eastern Europe  
3.2.3.1 Demand and Revenues  
3.2.3.2 Production, Capacities & Trade  

3.3 North America  
3.3.1 Canada  
3.3.1.1 Demand and Revenues  
3.3.1.2 Production, Capacities & Trade  
3.3.2 Mexico  
3.3.2.1 Demand and Revenues  
3.3.2.2 Production, Capacities & Trade  
3.3.3 USA  
3.3.3.1 Demand and Revenues  
3.3.3.2 Production, Capacities & Trade  

3.4 South America  
3.4.1 Brazil  
3.4.1.1 Demand and Revenues  
3.4.1.2 Production, Capacities & Trade  
3.4.2 Other South America  

3.5 Asia-Pacific  
3.5.1 China  
3.5.1.1 Demand and Revenues  
3.5.1.2 Production, Capacities & Trade  
3.5.2 India  
3.5.2.1 Demand and Revenues  
3.5.2.2 Production, Capacities & Trade  
3.5.3 Japan  
3.5.3.1 Demand and Revenues  
3.5.3.2 Production, Capacities & Trade  
3.5.4 South Korea  
3.5.4.1 Demand and Revenues  
3.5.4.2 Production, Capacities & Trade  
3.5.5 Other Asia-Pacific  
3.5.5.1 Demand and Revenues  
3.5.5.2 Production, Capacities & Trade  

4 Titanium Dioxide Pigments – Applications  
4.1 World  
4.1.1 Paints and Coatings  
4.1.2 Paper  
4.1.3 Plastics  
4.1.4 Other Applications  
4.2 Western Europe  
4.2.1 Paints and Coatings  
4.2.2 Paper  
4.2.3 Plastics  
4.2.4 Other Applications  
4.3 Eastern Europe  
4.3.1 Paints and Coatings  
4.3.2 Paper  
4.3.3 Plastics  
4.3.4 Other Applications  
4.4 North America  
4.4.1 Paints and Coatings  
4.4.2 Paper  
4.4.3 Plastics  
4.4.4 Other Applications  
4.5 South America  
4.5.1 Paints and Coatings  
4.5.2 Paper  
4.5.3 Plastics  
4.5.4 Other Applications  
4.6 Asia-Pacific  
4.6.1 Paints and Coatings  
4.6.2 Paper  
4.6.3 Plastics  
4.6.4 Other Applications  
4.7 Middle East / Africa  

5 Company Profiles  
5.1 Western Europe  
5.1.1 Ireland (1 Producer)  
5.1.2 United Kingdom (3)  
5.2 Eastern Europe  
5.2.1 Czechia (1)  
5.2.2 Poland (1)  
5.2.3 Slovenia (1)  
5.2.4 Ukraine (3)  
5.3 North America  
5.3.1 Canada (1)  
5.3.2 USA (5)  
5.4 South America  
5.4.1 Brazil (2)  
5.5 Asia-Pacific  
5.5.1 Australia (3)  
5.5.2 China (34)  
5.5.3 India (9)  
5.5.4 Japan (5)  
5.5.5 South Korea (1)  
5.5.6 Sri Lanka (1)  
5.5.7 Vietnam (1)  
5.6 Africa  
5.6.1 South Africa (1)
This study is particularly useful for

- Producers, suppliers, and traders of ilmenite, leucoxene, natural and synthetic rutile, titanium slag, and pigments

- Companies operating in the fields of: paints, coatings, paper, plastics, printing inks, rubber, fibers, ceramics, catalysts, titanium

- Associations and institutes, investors, consultancies, service providers, machine and plant manufacturers

- Executive board, technology and production, strategic planning, corporate development, R&D, market research, marketing, sales and distribution, procurement

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- Bags & Sacks - Europe
- Bags & Sacks - World
- Biocides - World
- Bioplastics - World
- Bitumen - Europe
- Butadiene - World
- Butadiene Rubber (BR) - World
- Caps & Closures - Europe
- Carbon Black - World
- Catalysts - World
- Chelating Agents - World
- Composites (CFRP & GFRP) - World
- Construction Plastics - World
- Corrugated/Solid Board/Carton - Europe
- Engineering Plastics - World
- Ethylene - World
- Expandable Polystyrene - World
- Fillers - Europe
- Fillers - World
- Flame Retardants - World
- Flexible Packaging - Europe
- Food Packaging - Europe
- Hydrofluoric Acid & Fluorochem. - World
- Insulation Material - Europe
- Insulation Material - World
- Labels - Europe
- Masterbatches - World
- Paints & Varnishes - Europe
- Paints & Varnishes - World
- Pigments - World
- Pipes - Europe
- Plastic Additives - World
- Plastic Bottles - Europe
- Plastic Caps & Closures - Europe
- Plastic Caps & Closures - World
- Plastic Containers - Europe
- Plastic Extrusion - World
- Plastic Films - Europe
- Plastic Films - World
- Plastic Injection - World
- Plastic Pipes - Europe
- Plastic Pipes - World
- Plastic Windows - World
- Plasticizers - World
- Plastics - Europe
- Plastics - World
- Polyamide (PA6 & PA66) - World
- Polyethylene (HDPE) - World
- Polyethylene (LDPE) - World
- Polyethylene (LLDPE) - World
- Polyethylene (PE) Pipes - World
- Polystyrene - World
- Polystyrene & Expandable PS - World
- Polyurethanes & Isocyanates - World
- Polyvinyl Chloride (PVC) - World
- Printing Inks - Europe
- Printing Inks - World
- Propylene - World
- PUR - Adhesives & Sealants - World
- PUR - Paints & Coatings - World
- PVC Pipes - World
- Rigid Metal Packaging - Europe
- Rigid Plastic Packaging - World
- Silicones - World
- Solvents - World
- Stabilizers - World
- Styrene - World
- Styrene-Butadiene Rubber (SBR) - World
- Surfactants - World
- Synthetic Rubber - World
- Thermoplastic Elastomers - World
- Titanium Dioxide - World
- Windows & Doors - Europe