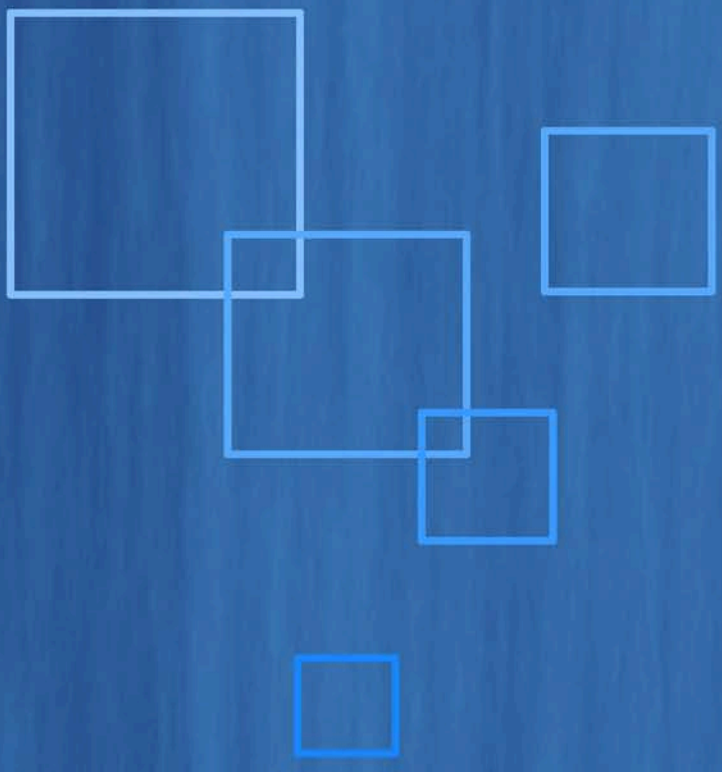
Market Report:

# World Plastics Additives Market

## Markets, Products, Applications, Innovations, Chances & risks, Competition, Prospects to 2015



Acmite Market Intelligence

May 2009

# Table of Contents

## Volume I

## Volume II



**Note:**

EUR 1 = US$1.3

Regions:

North America: US, Canada, Mexico (NAFTA region)

Asia Pacific: Countries of Asia, Australia, New Zealand

Asia Pacific*: Asia Pacific excluding Japan

Plastics additives can be classified into five broad categories: modifiers, property extenders, plasticizers, fillers and process aids.

**In term of value**

Property extenders are largest category, accounting for 31% of the total plastics additives consumption. It is as well the fastest growing category, driven by end users' requirement on better performance or extra properties of existing plastic products. Demand on property extenders is expected to grow by 3% annually in these two years and by 5% annually thereafter when economy revives. Total demand will increase to US$10.53 billion by 2012 and reach US$12.22 billion by 2015, from current US$9 billion.

Plasticizer, mainly used in PVC, is the single largest type of plastics additives. Its global demand was valued at US$8.38 billion in 2008, accounting for 31% of the total plastics additives market. The growth is tightly linked to the market prospect of PVC. The demand on PVC is forecast to see below average growth, as the flexible PVC market is slowing down due to the replacement by PE in some applications, particularly as packaging materials. Growing by 2.2-3.2% annually in the coming years, plasticizer market will grow to US$9.32 billion by 2012 and reach US$10.25 billion by 2015.

Modifiers combined make up 17% of the global plastics additives market, with sales valued at approximately US$4.64 billion in 2008. Modifiers market is expected to grow by slightly above average rate, namely by 2.5% in these two years and by 4.5% thereafter. Total demand is forecast to exceed US$5.5 billion by 2012 and to approach US$6.5 billion by 2015.

Global demand on fillers was estimated at US$2.26 billion (excl. carbon black) in 2008, making up nearly 10%. Market growth of fillers remains slow but steady. Promising growth prospect comes from high value added fillers, …

(Vol. I, P. 29)

**2007**

**Baerlocher expanded stabilizer range**

Baerlocher introduced new calcium-based (Baeropan SMS and Baeropan TX) and mixed-metal stabilizers and also launched a range of lubricant one-packs for wood-polymer composite (WPC) applications.

Ca-based stabilizers are now well accepted for rigid PVC applications. In Europe, more than 30% of lead stabilizers have been replaced by Ca-based systems and demand for these systems is also growing rapidly in Asia and South America.

**Polynt acquired Chinese plasticizer business**

Italy's Polynt Group has acquired the speciality plasticizers business of Chinese company Hinbo International Industrial Co Ltd, through its subsidiary Polynt Hong Kong Co Ltd.

The acquisition, which costs EUR1 million, is a part of Polynt's strategic growth in China. Further investment of around EUR9 million is also planned for the construction of new plasticizer plant with 25 000 tonnes/year to serve the growing Chinese and Asian market.

**Süd-Chemie sold nanoclay business to Rockwood**

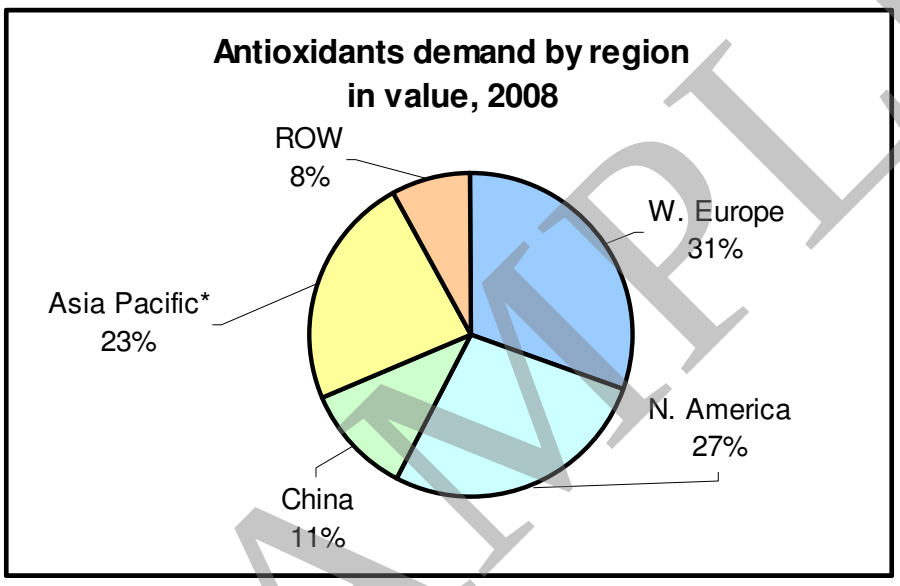
Süd-Chemie AG sold its Nanofil® nanoclay polymer additives business to Rockwood Clay Additives GmbH, the German subsidiary of US-based Rockwood Specialties Group. Süd-Chemie considered nanoclay operation not a good strategic fit within its chemicals operation, which focuses on adsorbents and catalysts.

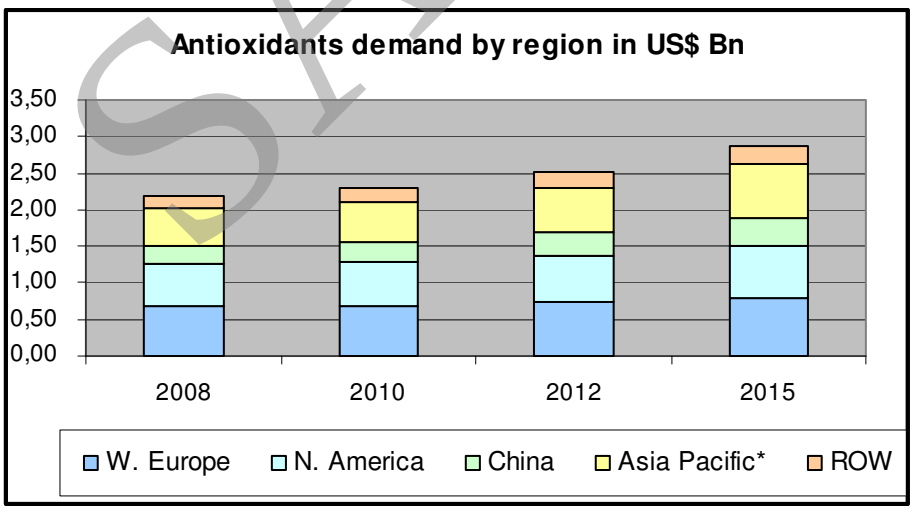
The Nanofil product range comprises organically modified bentonite products used as flame retardants in cable plastics, for optimizing the mechanical properties of polyolefins and in the films industry for improving barrier properties against gases and solvents. Rockwood believes that Nanofil product line…… (Vol. I, P88)

### 4.1.2.2 Antioxidant demand by region

Antioxidants demand by region in US$ Bn

| | 2008 | 2010 | AAGR | 2012 | 2015 | AAGR |
|---|---|---|---|---|---|---|
| W. Europe | 0,68 | 0,69 | 1,4% | 0,73 | 0,80 | 3,0% |
| N. America | 0,59 | 0,60 | 1,4% | 0,64 | 0,70 | 3,0% |
| China | 0,25 | 0,27 | 5,0% | 0,32 | 0,40 | 7,8% |
| Asia Pacific* | 0,51 | 0,55 | 3,5% | 0,61 | 0,73 | 6,0% |
| ROW | 0,18 | 0,19 | 3,2% | 0,21 | 0,24 | 5,0% |
| Total | 2,20 | 2,30 | 2,3% | 2,51 | 2,87 | 4,5% |




(Vol. I, P102)

### 4.8.3 Market trends and chances

**Increasing demand on tailored impact modifier systems**

The demand on plastic materials that are strong, stiff, and ductile will continue to increase. Processors are looking for cost-effective additives for such products, which stimulates the development of tailored impact modifier systems for specific resins.

**Better weatherability**

In outdoor applications, better weatherability is a key factor for impact modifiers. As plastics are increasingly used in outdoor areas, there is a trend toward the impact modifiers which exhibit outstanding weatherability in terms of color hold and impact retention in outdoor profiles like siding, fencing, and window products.

**Replacement of conventional materials by plastics**

The replacement of conventional materials such as metal, glass, and wood by plastics in easy applications, e.g. packaging and household goods, has been underway for years and will continue. The applications in durable goods such as automotive parts and construction are also converted to engineering plastics and then eventually lost to lower-cost polyolefins or vinyl type materials. Impact modification of engineering plastics and other polymers is a significant area for plastics additive development

**Rapid growth for acrylic impact modifiers**

Acrylic impact modifiers will continue to grow with the growth of rigid PVC in outdoor applications. Product development in this market will target improved low-temperature impact properties to reduce failures, lengthen the installation season, high clarity for packaging. Lower use level (e.g. less than 2%) is……..

(Vol. I, P.196)

# Croda International plc (UK)

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Year of foundation: 1920
Number of employees: about 4,000
Revenue 2007: £886.1 million

**Company profile**

Croda is a world leader in natural based specialty chemicals which are sold to virtually every type of industry. The business activities of the company can be broadly grouped into two sectors: Consumer Care and Industrial Specialities.

Activities can be broadly classified into two sectors:
Consumer Care which consists of global businesses in personal care, health care, home care and crop care – all markets with an increasing need for innovation and sustainable ingredients.
Industrial Specialities which comprises base oleochemicals, additives for polymers, polymers and coatings, lubricants and lubricant additives, and processed vegetable oils.

Its polymer additives business focuses on additives for surface modification of plastics, including friction reduction (slip agents), anti-blocking, anti-static, anti-fogging / wetting, dispersion technology and nano-particulate UV absorbers. The company runs two trade marks in this business: Crodamide™ and Atmer™.

(Vol. II, P. 68)

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| Code | Product | Page | Price Hardcopy* | Price Hardcopy+CD** |
|---|---|---|---|---|
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| **C4672** | **World Plastics Additives Market, Volume II** | Ca. 300 | ☐ **EUR 590** | ☐ **EUR 690** |
| **C4670** | **World Plastics Additives Market, Total (Volume I + II)** | Ca. 570 | ☐ **EUR 1590** | ☐ **EUR 1790** |
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