Global Market for Flame Retardant Chemicals Segmented by Application, Composition and Geography (2015-2020)

Description: Flame-retardants are compounds added to or applied in surface treatment of potentially flammable materials, including textiles and plastics. They inhibit, delay production of, or suppress flames to curb the spreading of fire. The global market for flame retardant chemicals is expected to grow at a healthy pace of 5.9% from $7.1 billion in 2013 to over $10 billion during the forecast period. With 47% of the global market share, Asia-Pacific is the largest market for flame-retardants and it is also the fastest growing, principally driven by China. The second largest market is North America followed closely by Europe.

Flame-retardants can be divided by their end use application in the sectors: electronic & electrical appliances, construction, wire & cable, automotives, textiles and others. The largest two sectors are construction and electronic and electrical appliances, together occupying about 46% of the total market. Electronic & electrical appliances along with wire & cable are the fastest growing markets; this growth can be credited to the rise in the demand for consumer electronics goods. This rise in demand helps the flame-retardants market by upping the CAGR by 8% in the forecast period. The automotive flame-retardant market is expected to grow driven by the growth of automotive industry in Asia-Pacific. Increasing economic prosperity worldwide, especially in emerging economies, has helped in shifting the preference towards low risk fire resistant materials. The demand for flame-retardants is in correspondence to GDP growth. A high GDP growth correlates to high construction activities and rise in the standard of living. The emergence of stringent fire safety standards and legislations across Europe, North America and the BRICS countries acts as a growth driver for the use of flame-retardants.

By composition, the key flame-retardants in the Asia Pacific market are- aluminium hydroxide, halogenated compounds, organophosphorus, nitrogen based compounds, inorganic compounds and organic compounds like nanocomposites and expandable graphite. Aluminium hydroxide is the most widely used and a fast growing sector due to its low adverse health effects, effectiveness as a smoke suppressant. Halogenated flame-retardants, which occupy about 30% of the global market share, are facing reduced dependence and a gradual phasing out due to their unfavourable health effects and emergence of alternative raw materials including metal hydroxides. In Europe, the Registration, Evaluation, Authorization and Restriction of Chemicals (REACH) and the EU Directive on the Restriction of Hazardous Substances Directive (RoHS) has banned several halogenated compounds and other materials from use as additives in plastics. In the US, the EPA probes the health and environmental effects of several chemicals but lacks sufficient power to ban them. However, several harmful chemicals have been restricted through legislations in various countries or voluntarily phased out by manufacturers due to their health concerns.

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