

Market Study: Stabilizers



World Report (6th edition)

This brochure provides further information on the study “Stabilizers - World (6th edition)”

The Market Study in Brief

Cables, pipes and window frames should ideally last forever. In most cases, they do if they are made of PVC – provided the material is protected with stabilizers against the harmful effects of oxygen and sunlight. Without stabilizing chemicals, many plastic and rubber products would be destroyed after a short time by heat, oxidation or UV rays. This is the sixth time that Ceresana has investigated the global market for these essential additives: The institute expects revenues from stabilizers for plastics and elastomers to grow to USD 7.3 billion annually by 2031.

Thermos stabilizers and UV stabilizers

The plastics industry requires large quantities of stabilizers, especially for the production and processing of PVC. The most important application is plastic pipes, for which more than 400,000 tonnes are currently consumed each year. They are followed by profiles, cables, films and other applications. Accordingly, demand for stabilizers is primarily determined by developments in the construction industry. Regional differences are striking: In Europe, stabilizers are mainly needed for PVC profiles, while in Asia they are used for pipes. Components made of plastic can help save energy.

Alternative stabilizers wanted

Stabilizers are mostly based on heavy metals such as lead or tin, but also on calcium, liquid metal soaps and other starting materials. In the European Union, the industry has been phasing out the use of lead-based stabilizers since 2015; the recycling of PVC with lead stabilizers is still controversial. By now, calcium-based stabilizers are by far the most demanded type in Europe. In other regions, demand for alternative, more environmentally

friendly stabilizers is also increasing. Ceresana forecasts global demand for calcium-based stabilizers to grow by 3.2% per year. Sales of tin stabilizers are expected to reach around 237,000 tonnes in 2031. Tin stabilizers account for the highest share of the overall market in North America.

Chapter 1 analyzes the global market – including forecasts up to 2031: for each region of the world, the demand and the revenue are provided. In addition, global and regional demand per type and per application is analyzed.

The following types are considered in detail:

- Tin stabilizers
- Lead stabilizers
- Calcium-based stabilizers
- Liquid mixed metal stabilizers & others

Areas of application examined in this study:

- Pipes
- Profiles
- Films
- Cables
- Floorings
- Other applications

Chapter 2 analyzes stabilizer demand and revenues for 22 countries. The demand is examined in detail for each stabilizer type and for the various application areas.

Chapter 3 provides profiles of the most important producers. The manufacturer directory is clearly arranged according to contact data, revenues, profit, product range, production sites, brief profile, types and applications. Detailed profiles are provided by the 72 most important manufacturers, such as Akdeniz, BASF, DIC, Evonik, Lanxess, Mitsubishi, Timah, Shin-Etsu, Solvay, Songwon, and Sumitomo.

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(For each region: Revenues as well as demand split by type and application)

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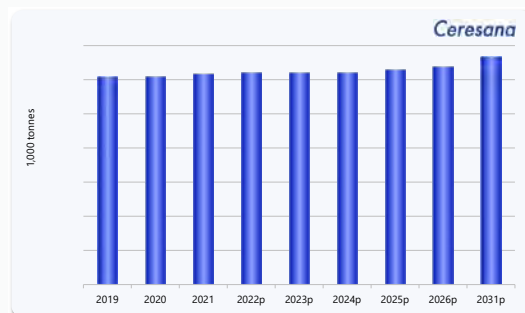
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2.1 Western Europe

2.1.3 Germany

The demand for stabilizers amounted to X tonnes in Germany in 2021. We expect demand to increase by an average of X % p.a. and to reach around X tonnes in 2031. Revenues generated with stabilizers amounted to approximately EUR X million in 2021. We expect an average increase of X % per year until 2031.



Graph: Demand in Germany from 2019 to 2031

| Revenues | 2019 | 2020 | 2021 | 2022p | 2023p | 2024p | 2025p | 2026p | 2031p | 2021-2031 |
|-------------|------|------|------|-------|-------|-------|-------|-------|-------|-----------|
| million USD | X | X | X | X | X | X | X | X | X | X p.a. |
| million EUR | X | X | X | X | X | X | X | X | X | X p.a. |

Table: Revenues generated in Germany from 2019 to 2031, in million USD and million EUR

| in 1,000 tonnes | 2019 | 2020 | 2021 | 2022p | 2023p | 2024p | 2025p | 2026p | 2031p | 2021-2031 |
|-----------------|------|------|------|-------|-------|-------|-------|-------|-------|-----------|
| Pipes | X | X | X | X | X | X | X | X | X | X p.a. |
| Profiles | X | X | X | X | X | X | X | X | X | X p.a. |
| Films | X | X | X | X | X | X | X | X | X | X p.a. |
| Cables | X | X | X | X | X | X | X | X | X | X p.a. |
| Floorings | X | X | X | X | X | X | X | X | X | X p.a. |
| Others | X | X | X | X | X | X | X | X | X | X p.a. |
| Total | X | X | X | X | X | X | X | X | X | X p.a. |

Table: Demand in Germany from 2019 to 2031 – split by applications

| in 1,000 tonnes | 2019 | 2020 | 2021 | 2022p | 2023p | 2024p | 2025p | 2026p | 2031p | 2021-2031 |
|---|------|------|------|-------|-------|-------|-------|-------|-------|-----------|
| Tin | X | X | X | X | X | X | X | X | X | X p.a. |
| Lead | X | X | X | X | X | X | X | X | X | X p.a. |
| Calcium-based | X | X | X | X | X | X | X | X | X | X p.a. |
| Liquid Mixed Metal Stabilizers & Others | X | X | X | X | X | X | X | X | X | X p.a. |
| Total | X | X | X | X | X | X | X | X | X | X p.a. |

Table: Demand in Germany from 2019 to 2031 – split by products

The "profiles" application area accounted for the largest share of total demand for stabilizers in 2021. Demand in this area is expected to develop most dynamically over the next ten years, at X % p.a.

Market Study: “Stabilizers - World (6th edition)”

22 Countries, 72 Producers, 270 Pages, 64 Graphs, 119 Tables, 01/2023

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2 Market Data: Country Profiles

(For each country: data on revenues, demand, applications, product types)

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- Germany (9)
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- Spain (1)
- Sweden (1)
- Switzerland (2)
- The Netherlands (1)

3.2 Eastern Europe

- Turkey (1)

3.3 North America

- USA (12)

3.4 South America

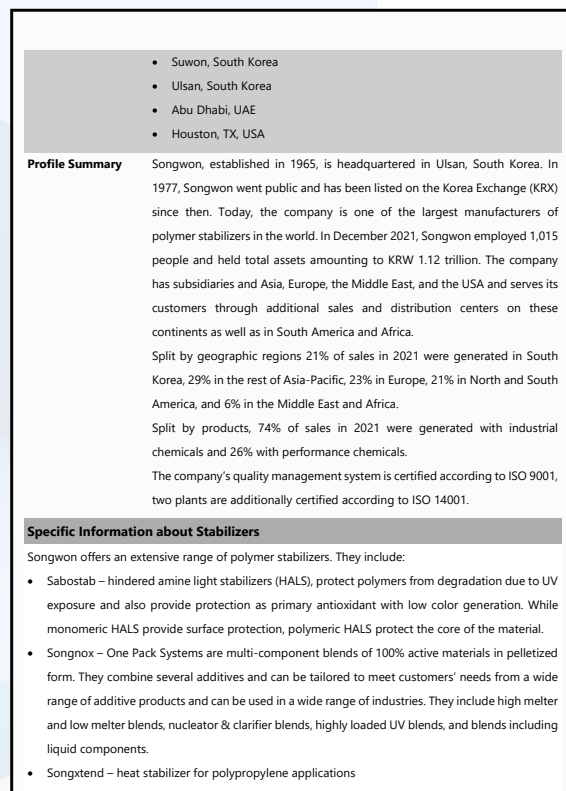
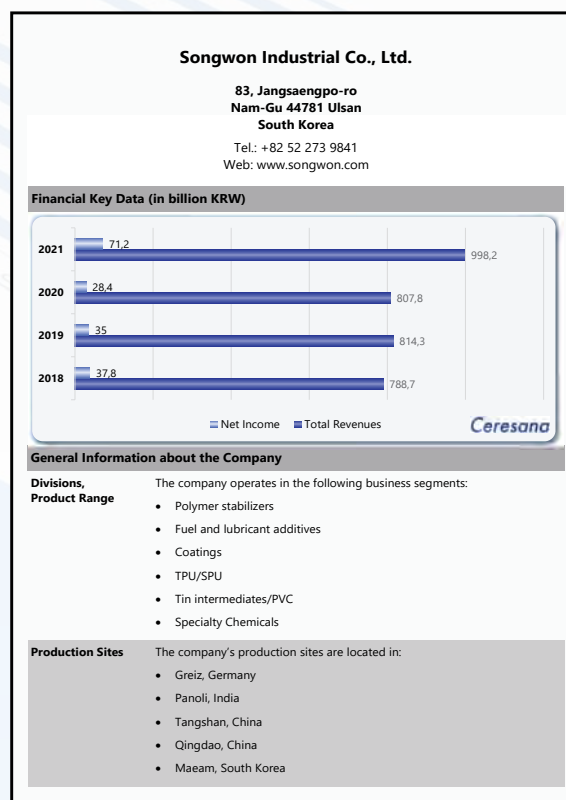
- Brazil (1)
- Colombia (1)

3.5 Asia-Pacific

- China (8)
- India (6)
- Indonesia (1)
- Japan (7)
- Singapore (1)
- South Korea (4)
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3.6 Middle East

- Iran (2)
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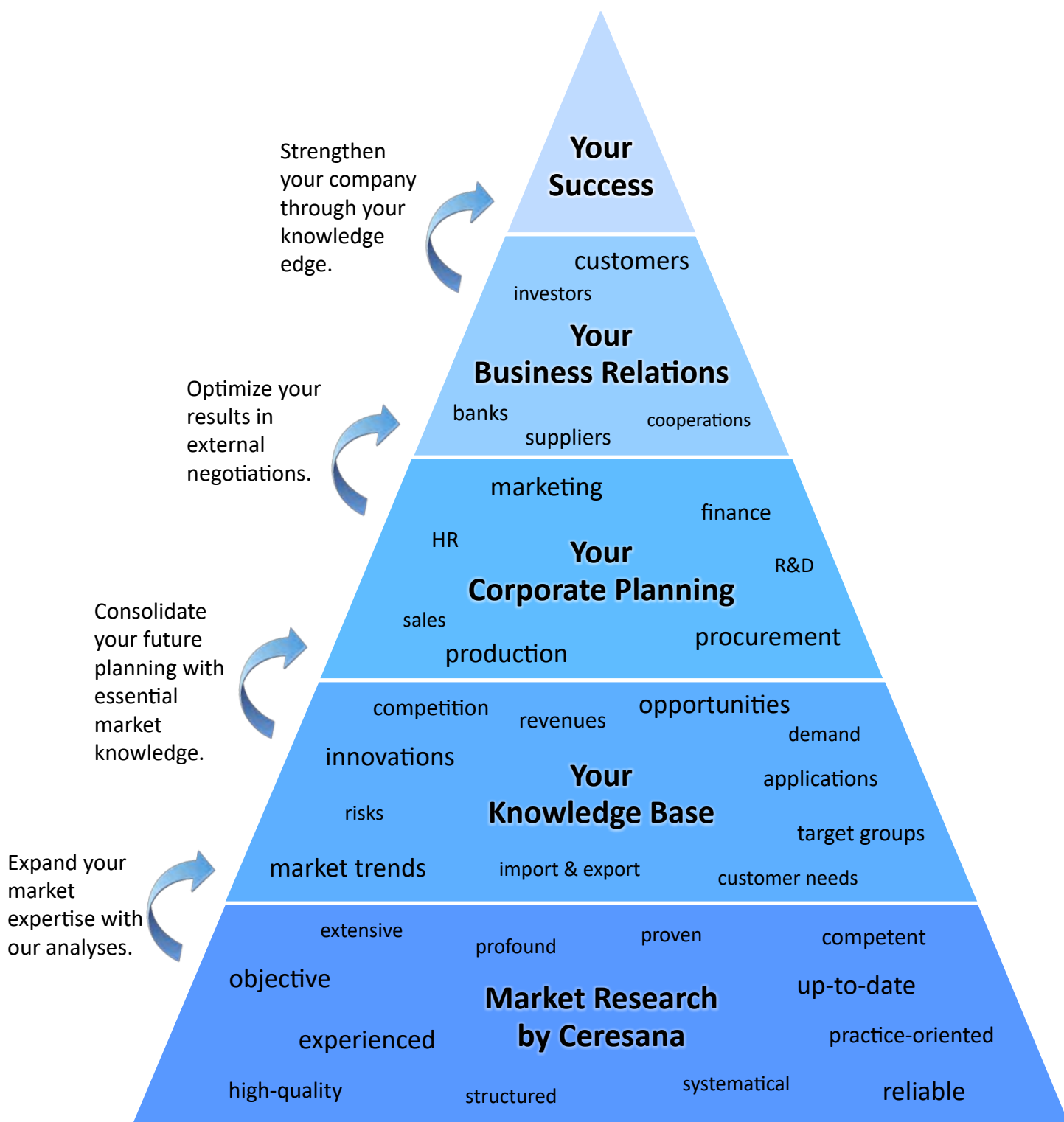


*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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- Executive boards, finance, business development, strategic planning, market research, marketing, sales, distribution, R&D, and procurement



**Thank you
for your trust!**



**If you have any questions, please
do not hesitate to contact us.**



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