

# Select Specialty Chemicals Applications – A Global End-Use Industry Analysis

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## Abstracts

### REPORT SYNOPSIS

The specialty chemicals industry constitutes a fundamental component of a number of global value chains, because of which it has a crucial role to play in achieving sustainability. This has become even more significant in the face of the COVID-19 pandemic that the world is confronting, prompting the sector to invest heavily in stimulus packages.

Accounting for a share of 44.2% in 2020, Cereals & Grains consume the largest quantity of Agrochemicals worldwide, the demand for which is projected to reach US\$143.5 billion by 2026 to reflect the fastest 2020-2026 CAGR of 4.9%.

Agrochemicals witnessed a positive growth in all application areas in 2020, despite the Pandemic impact.

### Research Findings & Coverage

Comprehensive analysis for Select Specialty Chemicals' market is carried out with respect to end-use applications of each chemical type

Across all major regions/countries, the market size of Select Specialty chemicals applications' is estimated/projected

Specialty Chemical Companies Take to Adopting Digital Platforms

Specialty Chemicals Sector Earmarks Funds for COVID-19 Stimulus Packages

## Transportation Applications Propel Demand for Adhesives & Sealants

Growing Population Sees Wider Adoption of Agrochemicals

Key market trends including growth drivers and opportunities

The report explores the market for end-use areas of all segments in each of the countries

Key business trends focusing on product innovations/developments, M&As, JVs and other recent industry developments

Major companies profiled – 61

The industry guide includes the contact details for 240 companies

## PRODUCT OUTLINE

The report analyzes the market for application areas of Specialty Chemical segments including:

Adhesives & Sealants – Assembly Operations, Building & Construction, Transportation and Others

Agrochemicals - Cereals & Grains, Fruits & Vegetables and Oilseeds, Pulses & Other Crops

Catalysts – Automotive, Chemical Manufacturing and Industrial

Construction Chemicals – Commercial, Industrial, Infrastructure and Residential

Electronic Chemicals – Printed Circuit Boards (PCBs) and Semiconductors & Integrated Circuits (ICs)

Engineering Thermoplastics – Building & Construction, Consumer Goods & Appliances, Electrical & Electronics, Industrial and Transportation

Nutraceutical Ingredients – Animal Nutrition, Dietary Supplements, Functional

Foods & Beverages and Personal Care

Paints & Coatings – Automotive, Building & Construction, Industrial, Marine and Others

Specialty Films – Electrical & Electronics, Food & Beverages, Industrial, Medical and Packaging

Water Treatment Chemicals – Chemical Processing, Food & Beverages, Municipal Water Treatment, Power Generation, Pulp & Paper and Others.

### Analysis Period & Units

The report reviews, analyzes and projects the global market for the period 2017-2026 in terms market value in US\$ and the compound annual growth rates (CAGRs) projected from 2017 through 2026 with special focus on y-o-y growth rate for 2019-2020

### Geographic Coverage

North America (United States, Canada and Mexico)

Europe (France, Germany, Italy, The United Kingdom and Rest of Europe)

Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)

South America (Argentina, Brazil and Rest of South America)

Rest of World

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3M Company (United States)

ADM (United States)

Air Products and Chemicals, Inc. (United States)

Akzo Nobel N.V. (The Netherlands)

Albemarle Corporation (United States)

Altana AG (Germany)

Arkema SA (France)

Ashland Global Holdings, Inc. (United States)

BASF SE (Germany)

Bayer AG (Germany)

Buckman Laboratories International, Inc. (United States)

Chevron Phillips Chemical Company LP (United States)

Clariant AG (Switzerland)

Croda International PLC (United Kingdom)

Daicel Corporation (Japan)

Dorf-Ketal Chemicals India Private Limited (India)

The Dow Chemical Company (United States)

Eastman Chemical Company (United States)

Element Solutions Inc. (United States)

Elevance Renewable Sciences, Inc. (United States)

Evonik Industries AG (Germany)

GEO Specialty Chemicals, Inc. (United States)

H.B. Fuller Company (United States)

INEOS Group AG (United Kingdom)

ICL Group Ltd. (Israel)

Johnson Matthey PLC (United Kingdom)

Lanxess AG (Germany)

Lubrizol Corporation, The (United States)

Lyondellbasell Industries N.V. (The Netherlands)

Merck KGaA (Germany)  
Mitsui Chemicals, Inc. (Japan)  
Nippon Chemical Industrial Co., Ltd. (Japan)  
Novozymes A/S (Denmark)  
Perstorp Holding AB (Sweden)  
Pidilite Industries Ltd. (India)  
PPG Industries, Inc. (United States)  
Saudi Basic Industries Corporation (SABIC) (Saudi Arabia)  
Solvay SA (Belgium)  
Sumitomo Chemical Co., Ltd. (Japan)  
Toray Fine Chemicals Co., Ltd. (Japan)  
W.R. Grace & Company (United States)  
Wacker Chemie AG (Germany)

## **5. KEY BUSINESS TRENDS**

PPG to Complete Acquisition of Tikkurila  
PPG to Takeover VersaFlex  
Launch of Evonik's VP 4200 Structure Modified Silica Type for Anti-Fouling Coatings  
Croda Signs Global Sales and Marketing Agreement with Genesis Biosciences  
Incorporation of Italmatch Biolab Industrial LCC  
Sirrus and NAGASE Specialty Materials Form Commercial and Application Development Pact  
Huntsman to Takeover Gabriel Performance Products  
H.B. Fuller Launches Advantra 9280 EU and Advantra BOLD 9480 Adhesives  
Launch of Honeywell's Fourth-Generation Combined Hydrocarbon Ozone Catalyst  
Ennis-Flint Acquired by PPG  
AkzoNobel to Expand its Presence in the North American Yacht Coatings Market  
Cool Roof France to Use Formulations with Arkema's Kynar Aquatec PVDF Resin  
SABIC Partners with DSM and Viscofan to Create Multi-Barrier Film for Meat Casings  
New Ecouse PET Films Developed by Toray  
Pidilite to Scale up Business with New Facilities in India  
Unveiling of Sika's New Purform Polyurethane Technology  
Expansion of Evonik's Marl Facility Produces 30% More Specialty Adhesive Raw Material  
Launch of PPG ENVIROCRON HeatSense Powder Coating for Heat-Sensitive Wood and Wood-Composite Applications  
Launch of Johnstone's Anti-Bacterial Matt Paint by PPG  
Launch of PPG AQUACOVER Waterborne Coating System for Shipping Containers in



China

SABIC Partners with Mars and Huhtamaki to Offer Polypropylene Film for Pet Food Packaging

Expansion of SABIC's portfolio of CYCOLOY and LEXAN Resins with Post-Consumer Recycled Material

Launch of SABIC's New LEXAN HP92AF Anti-Fog Film for COVID-19 Protection Equipment

New Long-Term Enterprise Agreement Signed by Solvay and Boeing

Sika Started Shotcrete Admixtures Production in France

INEOS Olefins and Polymers USA to Takeover Gemini HDPE LLC

Porocel Acquired by Evonik

Baker Hughes' Specialty Polymers Business Renamed as NuCera Solutions

Drilling Specialties Company Launches Tribex ERD Lubricant

Launch of PPG ENVIROCRON HTE Max Extreme Corrosion Polyester Powder Topcoat

Introduction of PPG SANISHIELD 3000/5000 Polyurea Coating System

Launch of Three New-Generation Performance Additives by Dow

Industrias Titan's Decorative Paints Business Acquired by AkzoNobel

AkzoNobel to Establish a New Powder Coatings Plant in Chungli

Pidilite to Takeover Huntsman Advanced Materials Solutions

COTEC Acquired by SDC Technologies

New Five-Year Registration for Bayer's XtendiMax herbicide with VaporGrip Technology

Sterling Auxiliaries to Takeover Baker Hughes' Sand Springs Chemicals Production Facility

BASF Introduces New Series of Alumina Supported Catalysts

Launch of New Heraeus Catalyst for PEM Electrolysis

Introduction of PPG Flooring Coatings

Launch of PPG's New Low-VOC Waterborne Coating System in China

Launch of New INVISU Acrylic Adhesive Portfolio by Dow

AkzoNobel to Expand Powder Coatings Production Capacity in Italy

Stahl Performance Powder Coatings Acquired by AkzoNobel

Launch of LEXAN Polycarbonate Resin by SABIC in Collaboration with Elkamet

SABIC and Bruckner Partner to Develop More Sustainable Products for Flexible Packaging

Sumitomo Chemical Establishes Zhuhai Sumika Polymer Compounds in China

Songwon Launches SONGFLAME WB 201 Flame-Retardant Dispersion

Mitsui Chemicals' BROFREYA SC Crop-Use Insecticide Achieves Registration in Japan

Solvay to Supply High Performance Materials for Lockheed Martin's F-35 Aircraft

Vanderbilt Chemicals Distributes Solvay's Fluoroelastomer Portfolio in North America

Ideal Work Acquired by Arkema

Establishment of Bora LyondellBasell Petrochemical  
Clariant to Construct New CATOFIN Catalysts Production Facility in China  
Clariant Catalysts and Tianjin University Partner to Develop New Catalytic Solutions  
New Range of MDI Polyether Prepolymers Launched by LANXESS  
AkzoNobel to Increase Production Capacity at its Guangzhou of Water-Based Paints  
SABIC to Expedite Order Fulfillment for Specialty Resins to Produce Essential Equipment to Survive COVID-19  
SABIC to Boost Specialty NORYL SA9000 Resin's Production Capacity  
Sumitomo Chemical's Six New SSS-Designated Products and Technologies  
SRF Commissions a New Specialty Chemicals Manufacturing Facility in Gujarat  
Commercial Launch of New Altrium Fluid Catalytic Cracking Catalyst by BASF  
New DOWSIL VE-8001 Flexible Silicone Adhesive Introduced by Dow  
INNATE TF Polyethylene Resins for Tenter Frame Biaxial Orientation Launched by Dow  
New Plasticizer-Free Pearlbond 920 TPU Launched by Lubrizol for Hot Melt Adhesives  
SABIC's Polycarbonate Facility in Spain to Become the World's First Chemical Plant to Run Entirely on Renewable Power  
BASF Launches New Virtual AUVOTs Display Automotive Coatings  
Launch of PPG's ULTRALAST Interior Paint + Primer with Proprietary Clean Surface Technology  
ChemSystems' Paper Business Acquired by Solenis  
Poliquimicos Acquired by Solenis  
Husco's New Innovations Based on SABIC's ULTEM PEI Resin for use in Automotives  
Saudi Aramco Acquires 70% Shares of SABIC  
Modern Waterproofing Group Acquired by Sika  
Launch of PolyMax 600 Series Polypropylene Catalysts by Clariant  
Unveiling of New Aptalon 8080HS High Solids Polyurethane Dispersion by Lubrizol  
AkzoNobel's Interpon D Architectural Powder Coatings Range Adds BioCote Antimicrobial Technology  
Launch of Amicult K42 Fertilizer by Perstorp  
Launch of Clariant's New Additive Solutions for Coating Applications in North America  
Honeywell Temporarily Shifts its Chemical Production Operations to Produce Hand Sanitizers  
Launch of INFINIUM Lower Yellowing Epoxy System by Hexion  
Launch of New DOWSIL EA-3838 Fast Adhesive  
Lubrizol Partners with GOJO to Offer PURELL Hand Sanitizer to Hospitals in Northeast Ohio  
Increase in the Production of Lubrizol's Carbopol Polymers  
AkzoNobel Takes Over Mauvilac Industries Limited  
New Mowiplus HPC 9600 Thickener for Sanitizing Gels to be Launched by Archroma

Health Canada Issues Interim Order for use of TORAYMYXIN Endotoxin Adsorption Cartridge for COVID-19 Treatment

Nufarm's Four South American Subsidiaries Acquired by Sumitomo Chemical

US Environmental Protection Agency Approves Solvay's PROXITANE AHC Disinfectant for use against SARS-CoV-2

Boeing's COVID-19 Face Shields to Use Solvay's Thermoplastic Films

Evonik Doubles Polyamide Production Capacity

Launch Evonik's Cost-Effective Additive Package for Interior and Exterior Paints

BASF Partners with Sibanye-Stillwater and Impala Platinum to Develop Tri-Metal Catalyst

Launch of BASF's Fourtune Fluid Catalytic Cracking Catalyst

Alpha Coating Technologies Acquired by PPG

Dow Launches New Generation Silicon Resin Emulsion for High Temperature Resistant Waterborne Coating Systems

Launch of Lubrizol's New Pearlbond 1170L Thermoplastic Polyurethane for Adhesive Powders, Films and Webs

Akzo Nobel Boya Sanayi ve Ticaret A.S. is Now a 100% Subsidiary of Akzo Nobel N.V.

Hammerite Ultima Water-Based Paint Introduced by AkzoNobel

Schmid Rhyner AG Acquired by ALTANA

SABIC, UPM and DSM Partner for the Launch of Renewable Chemicals

Launch of UPM Formi EcoAce Wood-Based Biocomposite Material Based on SABIC's TRUCIRCLE Renewable PP Polymers

New KANAME Flowable Fungicide Released by Sumitomo Chemical in Japan

Four Hubei Coronavirus-Designated Hospitals Employed Nippon Paint Antiviral Coating

Gaslog's Fleet to Apply Nippon Paint Marine's A-LF Sea Hull Coating

Evonik Introduces Three New SPHERILEX Silica Products for Paints and Coatings

Master Paints & Chemical Corporation's Joint Venture to Purchase Hexion's Colombia Site

One Ton of Rely+On Virkon Disinfectant Donated by LANXESS to Hospitals in Wuhan

Industria Chimica Reggiana Acquired by PPG

BMW Group Selects AkzoNobel as a Trusted Supplier of Vehicle Refinish Products & Services

Launch of New LNP ELCRES CRX Polycarbonate Copolymers by SABIC

Launch of SABIC PURECARES Polyolefin Products for Personal Hygiene Applications

Surgical Coatings Select Solvay's KetaSpire PEEK Powders for Electrosurgical Applications

Itibanyl Produtos Especiais Acquired by LANXESS

Ashland Extends Global Distribution Deal with IMCD

BASF to Expand Specialty Chemicals Production Capacity at its Ludwigshafen Facility

PPG Launches Marketplace-Ready Coatings at AABC Europe  
Lipofoods Became a Part of LLS Health  
Commercial Release of ESTANE 3D TPU M95A by Lubrizol Engineered Polymers  
DKSH is Now an Exclusive Distributor of SABIC's Specialty Materials in Greater China, South Korea, and Southeast Asia  
Sika Invests in Barranquilla Manufacturing Plant  
Lone Star to Purchase BASF's Construction Chemicals Business  
BASF to Build New Facility for Automotive Refinish Coatings in South China  
Saudi Arabian Fertilizer Company to Takeover SABIC Agri-Nutrients Investment Company  
New PPS Film for 5G Circuit Boards Developed by Toray  
Two New Catalyst Production Lines Established by Sumitomo Chemical in Chiba  
Inauguration of Sika's Third Production Plant in Indonesia  
Launch of Hydrasensyl Glucan by BASF  
Expansion of Surface Treatment Global Business Unit of BASF's Coatings Division in Germany  
Launch of Flextra Range of Glymo Free Adhesives by H.B. Fuller  
Mapaero Acquired by AkzoNobel  
AkzoNobel to Build Wood Coatings Facility in North America  
Launch of NORYL WM330G Resin by SABIC  
Eastman and NB Coatings Partner to Develop Novel Solution for Interior Class A Painted Surfaces with Treva Engineering Bioplastic  
Solvay Partners with Baker Hughes  
Adeplast SA Acquired by Sika  
PQ Group Holdings and INEOS Partner to Broaden Polyolefin Catalysts Portfolio  
BHGE is Now Baker Hughes Company  
Launch of Eastman's New Portfolio of 13 Cellulose Esters for Food Contact Applications  
New Pohan XHR Polybutylene Terephthalate Products Launched by LANXESS  
Investment in PPG's Automotive Adhesives and Sealants R&D Lab in Cleveland  
Launch of Dow's New ADCOTE L76-500 High-Solids Adhesive  
AkzoNobel Becomes the First Major Producer to Launch Recycled Paint  
Launch of Interpon Redox Range of High Performance Primers by AkzoNobel  
SK Global Chemical to Acquire Arkema's Functional Polyolefins Business  
XENOY HTX Polyester-Based High-Heat Resin Introduced by SABIC  
SABIC to Debut Polycarbonate Based on Certified Renewable Feedstock  
Toray's New Indian Facility to Produce PA, PBT and PPS Resin Compounds  
Evonik Launches New SILIKOFTAL HTW 3 Silicone Resin for Waterborne Coatings  
Launch of New TROGAMID HT Transparent Polyamide by Evonik  
Launch of Purethane A2018 Adhesive by Ashland

Launch of Ashland's New Solvester Laminating Adhesives Portfolio  
MasterProtect 8500 CI Launched by Master Builders Solutions  
GEO Specialty Chemicals Acquired by CPS Performance Materials  
H.B. Fuller Launches Advantra SMART adhesives in the EIMEA Market  
Unveiling of Hexion's Latest Epoxy Resin Coatings in Latin America  
New SYL-OFF Silicone Release Coatings and INVISU Acrylic Adhesives Launched by Dow  
Launch of Interpon D X-Pro Scratch-Resistant Powder Coating by AkzoNobel  
Launch of Awlgrip HDT Single-Stage Repairable Topcoat by AkzoNobel  
Lurapret Water-Based Ultra-Low VOC Polyurethane Polymer Coating Technology Introduced by Archroma  
Merger of Excel Crop Care Limited and Sumitomo Chemical India Limited  
Crevo-Hengxin Acquired by Sika  
Sika Broadens its Business Presence in West Africa  
Ashland Composites Business Acquired by INEOS  
Introduction of iblon Technology Fungicide by Bayer  
Chemstar Acquired by Ecolab  
Dexmet Acquired by PPG  
Launch of PPG AQUAPON WB EP Water-Based Epoxy Coating  
Emas Group Acquired by Sumitomo Chemical  
Full-Scale Operations to Begin at Sumitomo Chemical Chile  
H.B. Fuller to Launch of New Fulltak SE 8116 Water-Based Acrylic Adhesive  
Launch of PPG MOONWALK Automated Paint Mixing System  
AkzoNobel to Add Three New Production Lines at its Changzhou Powder Coatings Plant  
AkzoNobel to Takeover Mapaero  
Sika Expands Production Capacities in Southeast Europe  
Heraeus Epurio to Double its Specialty Chemicals Production Capacity in Dayton  
Launch of Ashland's Redesigned PureLED Line of UV LED Coatings and Adhesives  
Anagraf Comercial Grafica SL is Now Distributor of Ashland's Adhesives in Spain and Portugal  
BASF Builds Second Production Facility for UV Acrylic Hotmelts at the Ludwigshafen Site  
PPG to Offer Coatings, Solvents and Technical Services to the US Navy Military Sealift Command  
Launch of PPG DELFLEET ONE Paint System  
Launch of AkzoNobel's Interpon Low-E Powder Coatings  
New Chromate-Free Exterior Primer Developed by AkzoNobel and Airbus  
Launch of SABIC's New LNP ELCRIN iQ Polybutylene Terephthalate Compounded



## Resins

Bayer and AlphaBio Form Flipper Commercialization Pact

New Line of Coatings and Binders Introduced by Ashland to the European Market

Plans to Construct of First Production Plant at BASF's New Verbund Site in Zhanjiang

Launch of LegionGuard LG25 by Nalco Water

PPG to Reinforce Distribution Network for Architectural Coatings Business

Launch of PPG MACHINECOAT WB Weathering Stain for New Commercial Cedar Shingles

Introduction of Archroma's New Appretan NTR Water-Based Textile Coating Binder

Archroma's FADEX AS New Super UV Protector for Automotive and Transportation Textiles Launched

DSM to Purchase SRF's Engineering Plastics Business

Expansion of Mitsui Chemicals' PP Compound Production Facilities in Thailand

Sika's New Concrete Admixtures Production Plant in Qatar Set for Operation

Sika Acquires Parex

Solvay and Safran Join Forces for the Supply of High Temperature Composites and Adhesives

BASF to Modernize its Silica Plant at the Dusseldorf-Holthausen Site

BASF Increases Polyacrylamide Production Capacity by 20,000 Metric Tons

H.B. Fuller Launches Next Generation Adhesive Solutions for Woodworking at Ligna 2019

Hemmelrath Acquired by PPG

AkzoNobel to Reinforce Wood Coatings Business in the United States

Sika Doubles its Mortar Production Capacities in Egypt

Evonik Partners with Halchemix Canada to Distribute Mepron Dairy Feed Additive

ACP Acquired by Air Products

BASF's New Pilot Plant Facility for Catalyst and Process Development in Ludwigshafen

BASF to Establish Process Catalysis Research & Development Center in Shanghai

Establishment of H.B. Fuller Japan G.K.

Hexion to Launch Resonance Catalysts

Hexion Launches First-of-its-Kind, Two-Component Epoxy Manufacturing Solution at JEC World in Paris

Launch of PPG ENVIROCRON Extreme Protection Edge Coatings at Powder Coating 2019

North American Launch of PPG POWERCRON 160 Electrocoat

Whitford Worldwide Company Acquired by PPG

Launch of PPG ENVIROCRON Extreme Protection Edgecoatings

Laboratoire Phenobio Acquired by Lubrizol

Launch of Sikkens Coatings System by AkzoNobel

COHERE S-series Based on NEXLENE Technology Launched by SABIC  
Toray's New Polyphenylene Sulfide Resin with the World's Highest Flexibility Level  
Toray's New Low-Dielectric-Loss Polyimide Material for Electronic Components in 5G Communications and Millimeter-Wave Radar  
Sika Broadens Mortar Production Capacity in West Africa  
Belineco Acquired by Sika  
King Packaged Materials Company Acquired by Sika  
Introduction of Solvay's New Waterborne Halar ECTFE Coating System  
ADM Acquires Neovia  
Beijersbergen & Partners BV, New Partner to Distribute Ashland's Laminating Adhesives in the Netherlands and Belgium  
Hexion's VeoVa Vinyl Ester Monomer in Addapt VeoPox Adhesion Promotors  
Brenntag North America, the US and Canada Distributor for Hexion's Epoxy Specialty and Base Epoxy Resins and Intermediates  
Broadening of PPG HI-TEMP Line of High-Temperature-Resistant Coatings  
Launch of PPG SIGMAFAST 278 Epoxy Primer in the United States  
Amco Polymers, LLC, SABIC's Third Distribution Partner in North America  
Arysta LifeScience Acquired by UPL  
Evonik's TEGO Dispers 679 Dispersant for Solvent-Borne General Industrial Coatings  
Launch of Ashland's Aroset Gentle 700 Medical Pressure Sensitive Adhesive VELOX, Ashland's Composites Distributor for Sweden, Norway and Denmark  
Solenis Takeover BASF's Paper Wet-End and Water Chemicals Business  
Arysta LifeScience Inc. Acquired by UPL Corporation Limited  
Expansion of Innospec's R&D Capabilities for Performance Chemicals  
H.B. Fuller Introduces New Rakoll 4933 Formaldehyde-Free Water-Based Adhesive  
BASF's Wet-End Paper and Water Chemicals Business Integrated into Solenis  
SABIC Selects Chase Plastics to Distribute its Specialty Materials in North America  
Construction of Dorf Ketal's 4th Plant in India  
Structured Polymers Inc. Acquired by Evonik  
Ecolab to Takeover Holchem  
Launch of XPLORE Catalyst Platform by Albemarle  
The Carlyle Group and GIC Acquires AkzoNobel's Specialty Chemicals Business

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### **REGIONAL MARKET OVERVIEW**

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  - ADM (United States)
  - Air Products and Chemicals, Inc. (United States)
  - Albemarle Corporation (United States)
  - Ashland Global Holdings, Inc. (United States)
  - Baker Hughes Incorporated (United States)
  - BASF Corporation (United States)
  - Buckman Laboratories International, Inc. (United States)
  - Capital Resin Corporation (United States)
  - Chevron Phillips Chemical Company LP (United States)
  - The Dow Chemical Company (United States)
  - Eastman Chemical Company (United States)



Ecolab, Inc. (United States)

Element Solutions Inc. (United States)

Elevance Renewable Sciences, Inc. (United States)

GEO Specialty Chemicals, Inc. (United States)

H.B. Fuller Company (United States)

Heraeus Epurio LLC (United States)

Hexion Inc. (United States)

Honeywell International, Inc. (United States)

Innospec, Inc. (United States)

Lanxess Corporation (United States)

PPG Industries, Inc. (United States)

Solenis LLC (United States)

The Lubrizol Corporation (United States)

W.R. Grace & Company (United States)

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Akzo Nobel N.V. (The Netherlands)

Altana AG (Germany)

Archroma (Switzerland)

Arkema SA (France)

BASF SE (Germany)

Bayer AG (Germany)

Clariant AG (Switzerland)  
Croda International PLC (United Kingdom)  
Evonik Industries AG (Germany)  
Heraeus Holding GmbH (Germany)  
Honeywell Specialty Chemicals (Germany)  
INEOS Group AG (United Kingdom)  
Johnson Matthey PLC (United Kingdom)  
Lanxess AG (Germany)  
Lyondellbasell Industries N.V. (The Netherlands)  
Merck KGaA (Germany)  
Novozymes A/S (Denmark)  
Perstorp Holding AB (Sweden)  
Sika AG (Switzerland)  
Solvay SA (Belgium)  
Wacker Chemie AG (Germany)

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9.13 Major Market Players

Arysta Lifescience Corporation (Japan)

Daicel Corporation (Japan)

Dorf-Ketal Chemicals India Private Limited (India)

Mitsui Chemicals, Inc. (Japan)

Nippon Chemical Industrial Co., Ltd. (Japan)

Nippon Paint Co., Ltd. (Japan)

Pidilite Industries Ltd. (India)

Songwon Industrial Co., Ltd. (South Korea)

SRF Limited (India)

Sumitomo Chemical Co., Ltd. (Japan)

Toray Fine Chemicals Co., Ltd. (Japan)

Toray Industries, Inc (Japan)

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ICL Group Ltd. (Israel)

Saudi Basic Industries Corporation (SABIC) (Saudi Arabia)

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Italy

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