

Titanium Dioxide Market by Grade (Rutile, Anatase), Process (Sulfate, Chloride), Application (Paints & Coating, Plastics, Paper, Inks), & Region(North America, Europe, Asia Pacific, MEA, South America) - Trends and Forecasts up to 2026

<https://marketpublishers.com/r/TE4F43C9F86EN.html>

Date: July 2021

Pages: 234

Price: US\$ 4,950.00 (Single User License)

ID: TE4F43C9F86EN

Abstracts

The global Titanium Dioxide market size is estimated to be USD 20.9 billion in 2021 and is projected to reach USD 27.9 billion by 2026, at a CAGR of 5.9% between 2021 and 2026. Titanium dioxide is an oxide of metal titanium that occurs naturally in several kinds of minerals sands. It is the most important white inorganic pigment that possesses good thermal stability. It also has excellent light-scattering properties and is used when white opacity and brightness is required. Titanium dioxide is available in two crystal structures, namely, anatase and rutile. Rutile pigments are preferred because they are more stable, durable, efficient, and have high absorbance property than anatase pigments. Titanium dioxide is used in a wide range of industries and applications, including paints & coatings, paper, plastics, inks, and others. Titanium dioxide pigments are most widely used for paints & coatings application as they efficiently scatter visible light, which imparts whiteness, brightness, and opacity to the coating. The steady growth in construction industry and increase in demand for lightweight vehicle in automotive industry expects to drive market for titanium dioxide in paints & coating applications. Increase in demand for ultrafine titanium dioxide and growth in photocatalytic application are opportunities in titanium dioxide market.

“Rutile is projected to be the largest segment by grade in Titanium Dioxide market”

Rutile is the largest grade segment for the Titanium Dioxide market. The structure of rutile is more compact and stable than anatase. The rutile grade titanium dioxide has excellent optical properties, including better dispersion, better coloring, opacity-optimal

weather resistance, anti-yellowing property, and a bluer undertone. Rutile titanium dioxide is preferred in paints and coatings because it can offer better color strength and opacity than anatase-grade titanium dioxide. It is more suitable for exterior applications and used in interface applications because of its high refractive index; therefore, these pigments have improved ability to scatter light in paint films.

“Sulfate is projected to be the largest segment by process in Titanium Dioxide market”

Sulfate is the largest process segment for the Titanium Dioxide market. The sulfate process is a batch process that utilizes sulfuric acid to extract titanium dioxide from Ilmenite or titanium slag. The sulfate process for the manufacturing of titanium dioxide is majorly utilized in the APAC region, particularly in China. The sulfate process is more economical as it uses low-grade and cheaper ores, and simpler technology to manufacture titanium dioxide. The production cost of sulfate is high, and a large amount of waste material is generated during the process technology, which further includes pollution control cost. The global manufacturers are focused on shifting toward the chloride process due to environmental considerations and end-use requirements for high-quality titanium dioxide.

“Paints & Coating is the largest segment by application in Titanium Dioxide market during forecast region.”

Titanium dioxide is an essential white pigment used in the paints & coatings industries. When used in paint & coating system, it ensures the longevity of the paint and the continued protection of the substrate. Titanium dioxide is used in various paints & coatings applications to provide aesthetic appeal, opacity, and durability. It is used in various architectural and industrial coating applications. In architectural coatings, pigments are used in paints, stains, lacquers, primers, and clear coats applications. In industrial coatings, they are used in automotive, coil, powder, and other coating applications. The rapidly growing housing and construction sector, increasing gross domestic product (GDP), ongoing rapid urbanization, and increasing disposable income propel the paints and coatings market which further is fueling the demand for titanium dioxide.

“APAC accounts for the largest share in Titanium Dioxide market by region”

APAC was the largest Titanium Dioxide market in 2020. Increasing investments in infrastructure development projects, growing urbanization, improving standard of living, and thriving automotive sector, as well as high economic growth, are the key factors for

the region's overall growth. The strengthening economy of countries such as China and India attract new investments from global manufacturers. APAC is the largest market for the paints and coating industry, driven by the ever-increasing population and rapid urbanization in China and India. China is the world's largest producer and consumer of paints and coatings, with several leading players investing in the country to build new manufacturing facilities. Paints & coatings is the largest application segment for titanium dioxide which is projected to grow with growth in paint & coating application in APAC region. Apart from being a major consumer of titanium dioxide, China exports titanium dioxide to India, Vietnam, Brazil, Spain, South Korea, Japan, and others. Lomon Billions Group, the third-largest manufacturer of titanium dioxide globally, has its production plants in the China. Apart from Lomon Billions, TAYCA CORPORATION (Japan), ILUKA RESOURCES (Australia), ISHIHARA SANGYO KAISHA, LTD.(Japan) and many small and mid-size enterprises (SMEs) produce titanium dioxide in APAC region.

Extensive primary interviews were conducted to determine and verify the market size for several segments and sub segments and information gathered through secondary research.

The break-up of primary interviews is given below:

By Company Type - Tier 1 – 55%, Tier 2 – 30%, and Tier 3 – 15%

By Designation – C level – 21%, Director level – 23%, and Others* – 56%

By Region – North America– 15%, Europe – 27%, APAC – 45%, South America– 7%, and Middle East & Africa- 6%

Notes: Others include sales, marketing, and product managers.

Tier 1: >USD 1 Billion; Tier 2: USD 500 million–1 Billion; and Tier 3:

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*Details on Business Overview, Products Offered, Recent Developments, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

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