

White Inorganic Pigments Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Product (Titanium Dioxide, Zinc Oxide, Aluminum Silicate, Calcium Carbonate, Calcium Silicate, Silica, Others), By Application (Paints & Coatings, Plastics, Printing Inks, Cosmetics, Others), By Region and Competition

<https://marketpublishers.com/r/W07C47C68394EN.html>

Date: February 2024

Pages: 177

Price: US\$ 4,900.00 (Single User License)

ID: W07C47C68394EN

Abstracts

Global White Inorganic Pigments Market was valued at USD22.53 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 4.56% through 2029. Inorganic pigments are classified from various points of view. As a recommendation for ISO and DIN, we can classify inorganic pigments into four main groups, based on coloristic and chemical considerations. These are White Pigments, Black Pigments, Colored Pigments & Special Pigments. Titanium dioxide (rutile and anatase), and zinc sulfide, which includes lithopone and zinc oxide, are examples of white pigments. Examples of inorganic pigments also include white opaque pigments, which are used to provide opacity and lighten other colors.

The increasing use of white inorganic pigments in a wide range of products, including paints and coatings, adhesives and sealants, plastics, cosmetics, paper, and inks, is fueling the growth of the market. The rising demand for white inorganic pigments from various end-users such as the construction, automotive, and personal care industries further drives the growth of the market. The need for white inorganic pigments is significantly increased by the expansion of the global construction industry. Infrastructure for both residential and non-residential uses, such as commercial, industrial, and other uses, is a crucial part of the construction industry.

The three major countries contributing to more than 50% of the industry's overall growth are China, the US, and India. This growth is credited to the latest economic recovery of these major economies. The factors contributing to growth include globalization, urbanization, rising standards of living, rising purchasing power parity (PPP), infrastructure development, and the growing demand for megacities in developing countries. China and India are the Asia Pacific countries with high potential for growth in the construction industry. However, the need for residential and non-residential development is also significant in other regions, including North America, Europe, the Middle East & Africa, and South America, due to rising living standards.

However, the market expansion of inorganic pigments is restrained by stringent regulations related to cadmium- and chromium-based pigments. Pigments made from cadmium and chromium are dangerous for both the environment and workers as they contain heavy metals. These heavy metals pose hazards to human health, and the disposal of them during the production of pigments causes pollution. To ensure that the acid extractable metal levels are under control, careful processing is required.

Numerous Chinese producers have encountered difficulties due to inadequate treatment facilities and stringent governmental regulations, resulting in significant inorganic pigment production facilities shutting down. Regulations for the use of these pigments have been set by REACH, or Registration, Evaluation, and Authorization of Chemical Substances. These regulations aim to ensure the safe use and handling of pigments while minimizing environmental impact.

Key Market Drivers

Growing Demand of White Inorganic Pigments in Plastics Industry

White inorganic pigments, such as titanium dioxide and zinc oxide, are widely utilized in the plastics industry. These pigments serve multiple purposes, including imparting vibrant colors, enhancing opacity, and improving UV resistance. They play an indispensable role in the manufacturing of various plastic products, ranging from packaging materials and automotive parts to consumer goods and construction materials.

The demand for white inorganic pigments in the plastics industry is experiencing a remarkable surge, exerting a significant influence on the global market. As the plastics industry continues to witness substantial growth, particularly in developing regions, the demand for these pigments is anticipated to rise correspondingly, indicating a promising

future for the market.

Moreover, the increasing emphasis on sustainability and recycling in the plastics industry further drives the demand for white inorganic pigments. These pigments play a vital role in the recycling process, helping to preserve the quality and appearance of recycled plastic products. Their use ensures that the recycled materials maintain their integrity and appeal, contributing to a more sustainable and environmentally friendly approach to plastic production.

In conclusion, the escalating demand for white inorganic pigments in the plastics industry serves as a significant driver for the global market. As the plastics industry continues to expand and evolve, this trend is expected to persist, propelling the growth of the white inorganic pigments market. With their versatile properties and indispensable role, these pigments continue to shape the future of the plastics industry, catering to the evolving needs and demands of manufacturers and consumers alike.

Growing Demand of White Inorganic Pigments in Cosmetics Industry

White inorganic pigments, such as titanium dioxide and zinc oxide, are vital components in many cosmetic products. They serve multiple purposes, from providing color and improving texture to offering UV protection. These pigments are used in various products, including foundations, powders, lipsticks, and sunscreens, enhancing their aesthetic appeal and functionality.

The escalating demand for white inorganic pigments in the cosmetics industry is significantly shaping the global market. As the cosmetics industry continues to grow, particularly with the trend towards natural and organic products, the demand for these pigments is expected to rise correspondingly. This is driven by several factors, including the increasing awareness among consumers about the potential harmful effects of certain synthetic pigments and the growing preference for safer and more sustainable alternatives.

Furthermore, consumers' increasing preference for vibrant and long-lasting colors in cosmetic products is also driving the demand for white inorganic pigments. These pigments help achieve the desired color intensity and durability, making them indispensable in the cosmetics industry. Additionally, advancements in pigment technology have led to the development of innovative formulations that offer enhanced color payoff and longer wear time, further fueling the demand for white inorganic pigments.

In conclusion, the growing demand for white inorganic pigments in the cosmetics industry is a significant driver of the global white inorganic pigments market. As the cosmetics industry continues to evolve and expand, this trend is expected to persist, further propelling the growth of the white inorganic pigments market. Manufacturers and suppliers of white inorganic pigments should capitalize on these opportunities by continuously innovating and developing new products that meet the evolving needs and preferences of consumers.

Key Market Challenges

Volatility in Price and Availability of Raw Materials

Raw materials play a crucial role in the production of white inorganic pigments, such as titanium dioxide and zinc oxide. These compounds are derived from ores and minerals which are subjected to various chemical processes to produce the desired pigments. For instance, titanium dioxide is typically extracted from minerals like rutile and ilmenite through a complex refining process involving chemical reactions and purification techniques. Similarly, zinc oxide is obtained from the mineral sphalerite through a series of chemical transformations.

The volatility in the price and availability of these raw materials directly impacts the white inorganic pigments market. Fluctuating prices can significantly affect the cost of production, thereby influencing the overall profitability of pigment manufacturers. For example, sudden price hikes in titanium dioxide due to supply shortages or increased demand can pose significant challenges for manufacturers, as it can lead to higher production costs and reduced profit margins. Similarly, limited availability of zinc oxide can result in production delays and hinder the market's growth potential.

Similarly, the availability of raw materials is another critical factor that affects the white inorganic pigments market. Shortages or disruptions in supply chains, whether due to natural disasters, geopolitical tensions, or logistical issues, can lead to production delays and impact the market's growth. For instance, disruptions in the mining and transportation of titanium dioxide ores can limit the availability of this raw material, affecting the production capacity of pigment manufacturers.

Looking ahead, the future of the white inorganic pigments market could be influenced by several factors. Unpredictable changes in the global economy, environmental regulations, and geopolitical situations can all contribute to the volatility in raw material

prices and their availability. For instance, stricter environmental regulations on mining activities can impact the supply of raw materials, while geopolitical tensions can disrupt global supply chains. Additionally, emerging technologies and advancements in pigment production techniques may also influence the demand for and availability of white inorganic pigments in the market.

Key Market Trends

Increasing Technological Advancements in Pigment Production

Technological advancements in pigment production have brought about a revolution in the white inorganic pigments market. Through innovative techniques and cutting-edge technologies, the efficiency of production processes has been enhanced, leading to improved pigment quality and a reduced environmental impact.

One notable advancement in pigment production is the increasing role of nano-technology. The use of nano-sized white inorganic pigments offers unique properties, including heightened opacity and exceptional UV resistance. These properties make these pigments highly sought after in various industries, such as plastics and cosmetics.

Furthermore, significant progress has been made in chemical processes, enabling the production of high-quality white inorganic pigments like titanium dioxide and zinc oxide. These pigments boast superior color intensity, durability, and consistency, further elevating their desirability.

These remarkable technological advancements are not only elevating the quality and performance of pigments but also driving down production costs. As a result, white inorganic pigments are becoming more accessible and affordable to a wider range of industries.

Moreover, these advancements are opening up new and exciting opportunities in the market. For example, the development of eco-friendly pigments that meet stringent environmental regulations is creating an entirely new segment within the white inorganic pigments market.

Segmental Insights

Product Insights

Based on the category of product, the titanium dioxide segment emerged as the dominant player in the global market for white inorganic pigments in 2023. Titanium dioxide, known for its opaque white appearance and non-toxic nature, is widely utilized in the paint and coating industry due to its cost-effectiveness. Beyond its affordability, it is also known for its ability to provide white color strength and opacity in various applications. Notably, titanium dioxide possesses the unique property of scattering light and providing UV resistance.

The high demand for titanium dioxide can be attributed to its desirable qualities such as non-reactiveness, non-toxicity, and luminous properties. In addition to its applications in paints and coatings, this versatile compound finds its way into skincare and cosmetics products, where it serves as a pigment and a thickener for creams. Moreover, titanium dioxide is extensively used in sunscreens due to its transparency and efficient

Application Insights

The paints & coatings segment is projected to experience rapid growth during the forecast period. The industrial growth in developing countries, driven by rapid urbanization and industrialization, has led to a rise in demand for white inorganic pigments, particularly from the automotive sector. This surge in demand can be attributed to the increasing penetration of passenger vehicles, the modernization of vehicles, and the growing preference for luxury vehicles among consumers.

Furthermore, the industry is expected to witness sustained growth due to factors such as rising disposable income, evolving consumer lifestyles, and the increasing demand for these pigments in the construction sector. These trends are anticipated to contribute significantly to the growth of the industry during the forecast period.

Regional Insights

Asia Pacific emerged as the dominant player in the Global White Inorganic Pigments Market in 2023, holding the largest market share in terms of value. In recent years, there has been a notable increase in the demand for paints and coatings, as well as plastics, in the region. This surge can be attributed to several factors, including the strengthening of the economy in countries such as Japan, India, and China. With a growing population and rising disposable income, the penetration of passenger vehicles has also seen a significant rise. As a result, the market for paints and coatings, as well as plastics, is experiencing substantial growth in the region.

Moreover, the application areas for these products have expanded, further supporting the market growth. Easy availability of raw materials, driven by urbanization and industrialization in developing countries, has contributed to the increased demand for white inorganic pigments. These pigments find extensive use in various industries, including the automotive sector, where they are utilized for their exceptional performance and durability.

Additionally, the presence of major market players in the region has played a crucial role in boosting the market growth. With their expertise and advanced technologies, these industry leaders have been able to meet the growing demand and provide innovative solutions. As a result, the market for paints and coatings, as well as plastics, continues to thrive, driven by the combination of factors including economic growth, expanding application areas, and the presence of key players.

Key Market Players

Altana AG

BASF SE

Cathay Industries Inc

Clariant International AG

Cristal Co Ltd

Ferro Corporation

Gharda Chemicals Limited

Heubach GmbH

KRONOS Worldwide Inc

Lanxess AG

Report Scope:

In this report, the Global White Inorganic Pigments Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global White Inorganic Pigments Market, By Product:

- o Titanium Dioxide
- o Zinc Oxide
- o Aluminum Silicate
- o Calcium Carbonate
- o Calcium Silicate
- o Silica
- o Others

Global White Inorganic Pigments Market, By Application:

- o Paints & Coatings
- o Plastics
- o Printing Inks
- o Cosmetics
- o Others

Global White Inorganic Pigments Market, By Region:

- o North America

? United States

Canada

? Mexico

o Europe

? France

? United Kingdom

? Italy

? Germany

? Spain

o Asia Pacific

? China

? India

? Japan

? Australia

South Korea

o South America

? Brazil

? Argentina

? Colombia

o Middle East & Africa

? South Africa

? Saudi Arabia

? UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global White Inorganic Pigments Market.

Available Customizations:

Global White Inorganic Pigments Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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