Global Heat Stabilizers Market Research Report: Information by Form (Liquid and Solid), Type (Metallic Soaps, Organotin, and Others), Application (Pipes & Fittings, Profiles & Tubing, Wires & Cables, Coatings & Floorings, and Others), and Region (Asia-Pacific, North America, Europe, Latin America, and the Middle East & Africa) – Forecast till 2025

Market Synopsis

The global heat stabilizers market was valued at USD 3.64 billion in 2018 and is expected to grow at 4.4% CAGR during the forecast period. Heat stabilizers play a key role as an additive in the processing of PVC and other thermoplastic polymers. PVC processes require heat stabilizers, as when it is exposed to heat (>1000°C), HCl is released from the polymer backbone, which triggers its decomposition, discoloration, and embrittlement. Heat stabilizers significantly increase the heat stability of polymers by scavenging released HCl molecules. The various types of heat stabilizers available in the market are metallic soaps, organic, and others. Metallic soaps heat stabilizers available are lead-based, cadmium-based, tin-based, calcium-based, and mixed metal stabilizers (viz. Ba-Zn, Ca-Zn, Mg-Zn, and others). The two types of organic heat stabilizers are organometallic (organotin) and non-metallic organic stabilizers.

The widespread use of PVC and its use over conventional materials such as glass, wood, or metals across various end-use industries is the key factor driving the growth of the global heat stabilizers market. Additionally, the introduction of new organic variants of heat stabilizers to meet the stringent regulations by various regulatory bodies such as the US EPA and the European REACH and ECHA is also boosting the growth of the global heat stabilizers market.

However, stringent regulations against the use of heavy metal-based heat stabilizers are expected to restrain the market growth of the lead-based heat stabilizers to a large extent during the forecast period. The lead-based heat stabilizers are voluntarily being phased out from Europe under the Vinyl 2010/VinylPlus voluntary commitments of the PVC industry. Moreover, they are being rapidly replaced by mixed metallic soaps and organic-based heat stabilizers, and are expected to drive the market growth during the forecast period.

Furthermore, many of the market players are adopting strategies such as expansion, mergers & acquisition, product launch, and technological advancements to uplift the product market growth. For instance, in January 2018, Vikas Ecotech of India, announced its foray into the heat stabilizer segment for flexible PVC applications with the introduction of non-toxic and eco-friendly calcium zinc heat stabilizers and the facility has the potential to generate USD 8.5 million revenue at full capacity.

Global Heat Stabilizers Market Share in 2018, by Application
Market Segmentation

The global heat stabilizers market has been segmented by form, type, application, and region.

By form, the global heat stabilizers market has been bifurcated into solid and liquid.

Based on type, the global heat stabilizers market has been categorized into metallic soaps, organotin, and others.

Based on the application, the global heat stabilizers market has been segmented into pipes & fittings, profiles & tubing, wires & cables, coatings & floorings, and others.

Regional Analysis

The global heat stabilizers market has been cataloged into five regions, namely, Asia-Pacific, North America, Europe, Latin America, and the Middle East & Africa.

Asia-Pacific dominated the global heat stabilizers market in 2018 and is expected to continue dominating the market during the forecast period. The market growth is driven by the rapid industrialization and urbanization in the region owing to the growing economies, easy investment norms, low production cost, and inexpensive labor. The automobile industry in China is driving the demand for PVC in accordance with the growing trend towards replacing metal parts with plastic and composites to increase fuel-efficiency and is expected to continue growing at the same pace during the forecast period. Furthermore, the growing healthcare industry, due to rising government initiatives and growing healthcare expenditure, is propelling the demand for PVC required to manufacture flexible containers and tubing. Moreover, the ‘Make in India’ initiative taken by the Indian government is expected to fuel the growth of the domestic electrical & electronics and footwear industries in the country, which in turn, is expected to boost the heat stabilizer market over the forecast period.

Europe follows Asia-Pacific in terms of market size and is expected to show considerable growth during the forecast period. The established automotive industry is contributing to the product market due to the growing application of PVC in automotive components and is expected to exhibit significant growth during the forecast period. The growing building and renovation activities in the region are expected to boost the product market during the forecast period. Furthermore, the increasing preference for mixed metals and organic heat stabilizers due to stringent regulations are further expected to stimulate the product market during the forecast period.

North America is another major market for heat stabilizers and is expected to show significant growth during the forecast period. The increasing construction & renovation activities in the US is witnessing high PVC demand and, thus, positively impacting the product market. Additionally, the established healthcare industry in the US is significantly driving the product market. The growing electrical & electronics industry is also significantly supporting the heat stabilizer market growth in the region.

The market in the Middle East & Africa is expected to register significant growth during the forecast period due to the growing construction industry in the region. The ongoing infrastructural projects in the UAE and Qatar are likely to create a demand for heat stabilizers in the region.

The market in Latin America held the least share of the global market in 2018 and is expected to
exhibit moderate growth during the forecast period. Growing construction activities in Brazil, Mexico, and Argentina are expected to drive market growth in the region.

**Key Players**

The prominent manufacturers operating in the global heat stabilizers market are Kisuma Chemicals (Netherlands), GOLDSTAB ORGANICS PVT LTD (India), Galata Chemicals (US), MODERN CHEMICALS AND PLASTICS (India), ADEKA CORPORATION (Japan), Baerlocher GmbH (Germany), Amfine Chemical Corporation (US), Chemson Polymer-Additive AG (Austria), Clariant (Switzerland), BASF SE (Germany), BRUNO BOCK (Germany), and REAGENS SPA (Italy).

**Intended Audience**

- Heat stabilizers manufacturers
- Traders and distributors of heat stabilizers
- Research and development institutes
- Potential investors
- Raw material suppliers
- Nationalized laboratory
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