

Fumed Silica - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Fumed Silica Market size is estimated at 305.28 kilotons in 2024, and is expected to reach 386.47 kilotons by 2029, growing at a CAGR of 4.83% during the forecast period (2024-2029).

The market was negatively impacted by the COVID-19 pandemic in 2020. Construction and automotive manufacturing activities were on a temporary halt due to the pandemic. This minimized the demand for additives used in the formulation of products such as adhesives, paints, coatings, plastics, and composites, negatively impacting the market demand for fumed silica. However, the market retained its growth trajectory last year due to all the industries resuming production processes.

Key Highlights

- Over the short term, the surging demand for fumed silica from products in the personal care segment, such as toothpaste, creams, and others, is expected to drive the market's growth.
- The development of biogenic fumed silica and precipitated silica as a substitute for fumed silica is anticipated to hinder the market's growth.
- The emerging applications of fumed silica in various industries are likely to act as an opportunity.
- The Asia-Pacific region dominated the global market, with the highest consumption coming from countries such as China and India.

Fumed Silica Market Trends

Increasing Demand from the Adhesives and Sealants Segment

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- In adhesives and sealants, fumed silica is used to increase the product viscosity, improve anti-settling properties during storage, control the extrusion properties during the application, and impart anti-sag properties during cure. The additive can also act as a reinforcing agent to improve the physical properties, especially the tear strength of the cured sealant.
- Further, adhesives and sealants are applied in the construction industry, where they can be used for carpet laying, countertop lamination, drywall lamination, ceramic tile adhesion, air conditioning setup, and others.
- In the construction industry, fumed silica adhesives and sealants are used in structural glazing and weatherproofing, contributing to the energy efficiency of buildings. They also help improve in-shop productivity, reduce material waste, extend building life, and reduce lifecycle costs.
- According to the Institution of Civil Engineers, China, India, and the United States are expected to account for almost 60% of all global growth in the construction sector by 2025, thus increasing the market growth of fumed silica in the industry.
- The United States was among the top construction markets globally. As per the United States Census Bureau, construction was the 12th largest industry in the country in 2022 and accounted for approximately 4.3% of its total GDP. As per the US Census Bureau, the market size of the US construction sector was around USD 1.79 trillion in 2022.
- According to the US Census Bureau, during the first nine months of 2023, construction spending amounted to USD 1,463.5 billion, 4.6% above the USD 1,398.9 billion for the same period in 2022.
- In Europe, manufacturers in the do-it-yourself (DIY) adhesives market have switched to clear packaging, where the opaque reinforcing aids additives used for rheology control and the reinforcements are replaced by fumed silica, which closely matches its refractive index with transparent polymers.
- Treated fumed silica provides significantly more adhesive strength. It has a lower specific gravity than calcium carbonate and contributes far less to adhesive weight, which can benefit applications where adhesive weight is a concern, such as automotive manufacturing.
- The automotive industry is one of the major consumers of adhesives and sealants. The applications include sealing heat exchanger tubes, gearbox and sump cover gasketing, bonding interior dashboards, and others. According to the OICA, global vehicle production reached 85.02 million units in 2022, with an increase of 6% from the previous year's production of 80.20 million units.
- Therefore, such factors are expected to impact the fumed silica market significantly over the forecast period.

Asia-Pacific Region to Dominate Market Demand

- The Asia-Pacific region dominated the market with the largest share and high demand from countries such as China and India.
- The manufacture of silicone adhesives begins by isolating silica from silicon. Silica can be found in its pure form in some minerals. Silicone adhesives are widely used due to their excellent elastomeric properties, extended temperature range, resistance to the effects of fuels, and low shrinkage and shear stress.
- Countries in the Asia-Pacific region, such as China, India, and Vietnam, have been registering strong growth in construction activities, which is expected to drive the consumption of fumed silica in the region over the forecast period.
- China and India contribute to more than 50% of the total share of the Asia-Pacific region in the adhesives and sealants market. They are also the largest producer of paints and coatings in the Asia-Pacific region.
- In January 2023, Asian Paints approved an investment of INR 2,000 crore (USD 240.53 million) for a new waterborne paint manufacturing plant with 400,000 kiloliters per annum capacity in Madhya Pradesh, India. The facility's manufacturing is expected to be commissioned in three years.

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- In July 2022, BASF SE, through its subsidiary BASF Coatings (Guangdong) Co. Ltd (BCG), expanded its manufacturing capabilities for automotive refinish coatings at its coatings site in Jiangmen, Guangdong Province, South China. The company increased its production capacity to 30,000 ton annually through this expansion project.

- The pharmaceutical industry in India is a major consumer of fumed silica, used as a high-purity excipient and multi-functional additive. The country is the largest provider of generic drugs globally, fulfilling 40% of the generic demand in the United States and 25% of all medicine demand in the United Kingdom.

- Fumed silica is used in many demanding adhesive applications, from building, construction, and automotive applications to packaging. High demand from the adhesives and sealants sector is expected to drive the fumed silica market.

- In the construction industry, fumed silica is used in adhesives, sealants, coatings, and plastics. China is experiencing massive growth in its construction sector. According to the National Bureau of Statistics of China, the construction output value in China achieved its peak at around USD 4.64 trillion in 2022. It rose by 6% compared to USD 4.36 trillion in 2021.

- Adhesives, sealants, paints, and coatings are also finding application in the automotive industry. The Asia-Pacific automotive manufacturing industry is the largest in the world. According to the OICA, automotive production in Asia-Pacific stood at 50.02 million units in 2022, up 7% from 46.77 million units in 2021.

- The factors above are expected to increase the demand for fumed silica in the Asia-Pacific region over the forecast period.

Fumed Silica Industry Overview

The fumed silica market is mostly consolidated. The major players (not in any particular order) include Evonik Industries AG, Cabot Corporation, Wacker Chemie AG, Tokuyama Corporation, and OCI COMPANY Ltd, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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