

AN OVERVIEW OF THE GLOBAL RADIATION CURING MARKET - 2003

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IAL Consultants has updated its successful technical and marketing overview of the Global radcure industry, first published in 1998. The market is analysed in terms of raw materials, formulated products and end-use applications and forecasts are provided for 2007.

Raw materials are discussed for both free radical and cationic systems, in terms of photoinitiators (including benzophenones, alpha-cleaving, acetophenones, thioxanthenes and cationics), monomers, oligomers, vinyl ethers and epoxides.

Estimates for both acrylic and non-acrylic systems are included, together with market sizes for unsaturated polyester/styrene systems used for wood coatings.

Regions covered:

- **EMEA:** Western & Eastern Europe, Middle East and Africa
- **Americas:** North and South America
- **Asia Pacific:** North Asia, South East Asia, Indian Sub-continent and Oceania

The global market by volume is sub-divided

Raw materials by region:

	%
EMEA	34
Americas	28
Asia-Pacific	38

Formulated products by region:

	%
EMEA	34
Americas	34
Asia-Pacific	32

Formulated products by end-use:

	%
Graphic Arts	33
Industrial Coatings	43
Opto-electronics	19
Adhesives et.al.	5

Estimates for both acrylic and non-acrylic systems are included and the end-use sectors are discussed in terms of:

- Graphic arts (printing inks, plates and overprint lacquers)
- Industrial coating (wood, plastic, metal and other)
- Opto-electronics (photoresists, resists, optical fibre and LCD)
- Adhesives (structural, laminating and PSA)

Market Trends and Influences

- Thanks to the growth in the Chinese market, all three geographical regions had an equal demand in 2002 for formulated radcure products
- Asia Pacific region will have the highest AGR% over the next 5 years (8% p.a.), EMEA (5% p.a.) and Americas (3% p.a.)
- Development of niche markets and specialist raw materials to provide "added value" to suppliers in Europe and North America
- Low cost UV lamps from China causing "western manufacturers" to improve quality of their products
- UV/EB plastic coatings of great interest and potential in all three regions
- High "added value" opto-electronics sector still buoyant in Asia-Pacific, static in North America but declined in Europe, due to the recent transfer of mobile phone manufacture to the Far East
- In spite of superior product performance and environmental benefits, perceived high investment costs still restricting growth of UV/EB technology in North America and Europe
- Water starting to replace acrylate monomers as diluent in some radcure formulations

The report highlights some of the main areas of opportunity for radcure technology over the next five years and contains an extensive directory listing the main raw material suppliers and formulators of radcure products.

The information has been compiled from an extensive programme of visits and telephone discussions with high level respondents, representing all sectors of the industry throughout Europe, USA and Japan.

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