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Rubber Processing Chemicals: Europe

February 2020



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About This Report

Scope

This report forecasts to 2023 rubber processing chemical demand in metric tons in Europe. Total demand is segmented by product in terms of:

- antidegradants
- accelerators
- other products such as adhesion promoters, blowing agents, and plasticizers

Total demand is also segmented by application as follows:

- tire
- non-tire

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

Within this report, the word “demand” is used synonymously with “consumption”, and includes captive consumption. Demand for these chemicals includes only those quantities used in rubber processing; quantities used in the processing of plastics and other materials are excluded.

There is no universally accepted definition of the term “rubber processing chemical”. For the purposes of this report, the term includes only chemicals used in rubber compounding. Reinforcing materials (such as silica and carbon black), inert fillers, extenders, processing oils, and diluents (such as clay, talc, and calcium) are excluded from the scope of this report. Also excluded from consideration are waxes, sulfur, zinc oxide, and stearic acid.

Rubber consumption includes both natural and synthetic rubber. Rubber consumption figures refer to the “dry weight” of the rubber (i.e., they do not include the weight of extender oil or any additives). These figures include only new rubber; reclaimed rubber is excluded.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

About This Report

Table 5 | Countries in Western Europe

Andorra	Guernsey	Norway
Austria	Iceland	Portugal
Belgium	Ireland	Saint Pierre and Miquelon
Channel Islands	Isle of Man	San Marino
Faeroe Islands	Italy*	Spain*
Finland	Jersey	Sweden
France*	Liechtenstein	Switzerland
Gibraltar	Luxembourg	United Kingdom*
Germany*	Malta	Vatican City
Greece	Monaco	
Greenland	Netherlands	

*Major rubber processing chemical markets

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

*Major rubber processing chemical markets

Source: The Freedonia Group

Sources

Rubber Processing Chemicals: Europe (FE35079) is based on *Global Rubber Processing Chemicals*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications

About This Report

- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Rubber Processing Chemicals

HS Code	Definition
3812	Prepared rubber accelerators; compound plasticisers for rubber or plastics, n.e.c, or included; anti-oxidising preparations and other compound stabilisers for rubber or plastics

Source: United Nations Statistics Division

Table 8 | NACE Codes Related to Rubber Processing Chemicals

NACE Code	Definition
20.1	Manufacture of basic chemicals, fertilizers and nitrogen compounds, plastics and synthetic rubber in primary forms
20.17	Manufacture of synthetic rubber in primary forms
22.1	Manufacture of rubber products

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Global Tires

Recreational Vehicles in the US

Silicones Market in the US

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Motorcycles: United Kingdom

Motorcycles: United States

Motor Vehicles: United States

Rubber: United States

Tires: United Kingdom

Tires: United States

Transport Equipment: United States

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Trade Publications

European Rubber Journal

Global Rubber Markets

Rubber & Plastics News

Rubber Statistical Bulletin

Rubber World Magazine

Agencies & Associations

Association for Rubber Products Manufacturers
European Chemicals Agency
European Environment Agency
European Rubber Chemicals Association
European Tyre & Rubber Manufacturers' Association
International Monetary Fund
International Rubber Study Group
Organisation for Economic Co-operation and Development
Tire Industry Association
United Nations Comtrade
United Nations Environment Programme
US Tire Manufacturers Association
World Bank