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Global Rubber Processing Chemicals

February 2020



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About This Report

Scope

This report forecasts to 2023 global demand for rubber processing chemicals by product, application, and major world region in metric tons. Product segments include:

- antidegradants
- accelerators
- other products such as processing aids and plasticizers, adhesion promoters, and secondary vulcanizing agents

Reported applications encompass:

- tires
- non-tire rubber products such as hoses, mechanical goods, and belts

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, application, and regional demand (including product and application segments) are provided 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.

Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Rubber Processing Chemicals (FW35079) is based on 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:

About This Report

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- 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 9 | NAICS & SIC Codes Related to Rubber Processing Chemicals

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	2869	Industrial Organic Chemicals, Not Elsewhere Classified
		2899	Chemicals and Chemical Preparations, Not Elsewhere Classified

Source: US Census Bureau

Table 10 | HS Code 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 11 | 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.

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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Freedonia Industry Studies

Liquid Silicone Rubber

Global Buses

Global Hybrid & Electric Vehicles

Global Industrial Rubber Products Market

Global Motorcycles

Global Rubber Conveyor Belts

Global Silicones

Global Tires

Recreational Vehicles in the US

Silicones Market in the US

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Global Light Vehicles

Global Medium- & Heavy-Duty Trucks & Buses

Hoses & Belts: United States

Medium- & Heavy-Duty Trucks & Buses: United States

Motorcycles: United States

Motor Vehicles: United States

Rubber: United States

Tires: United States

Transport Equipment: United States

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Rubber Statistical Bulletin

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United Nations Comtrade

United Nations Environment Programme

United States Census Bureau

United States Environmental Protection Agency

United States International Trade Commission

US Tire Manufacturers Association

World Bank