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World Rubber Processing Chemicals

Industry Study with Forecasts for **2015 & 2020**

Study #2863 | March 2012 | \$6100 | 295 pages

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Growth will be driven by continuing robust gains in the Asia/Pacific region (especially China), and recovery in demand in the US, Western Europe and Japan following their recent declines.

World demand to rise 4.7% annually through 2015

Global demand for rubber processing chemicals is forecast to increase 4.7 percent per year through 2015 to 1.4 million metric tons. Growth will be driven by continuing robust gains in the Asia/Pacific region (especially China), and recovery in demand in the US, Western Europe and Japan following declines in all three areas between 2005 and 2010. Rubber chemical demand in China is projected to grow 8.1 percent per year through 2015 to more than 575,000 metric tons. Gains will benefit from healthy growth in both tire and non-tire rubber demand, with the latter rising especially strongly. The US, Japan and Western Europe are all expected to see a reversal from the declines experienced between 2005 and 2010. However, growth in all three is projected to be less than one percent per year through 2015, reflecting market maturity in rubber consuming sectors.

Antidegradants demand to grow 4.6% annually

Demand for antidegradants (which improve rubber's resistance to the effects of oxidation, ozone, heat, sunlight and mechanical stress) is projected to grow 4.6 percent per year through 2015 to nearly 825,000 metric tons. Antidegradant demand will be fueled by both expansion in its major applications (tires and industrial rubber products) and continuing efforts to improve performance and lengthen service lives of

World Rubber Processing Chemical Demand, 2015 (1.4 million metric tons)



China
42%

Other Asia/Pacific
23%

North America
11%

Western Europe
10%

Other Regions
14%

photo: Lanxess

rubber goods. One factor that will counter increasing antidegradant usage is the faster growth in demand for natural rubber versus synthetic rubber. Natural rubber has inherent antioxidative properties and requires lower antioxidant loadings than synthetic rubber to achieve similar properties.

Accelerator demand will exceed 415,000 metric tons in 2015. These chemicals, which control the vulcanization process, are required in all vulcanized rubber products. As such, demand tends to track overall rubber consumption. However, accelerator demand growth will outpace rubber consumption gains due to the above-average gains forecast for secondary or ultra-accelerators,

which offer rapid cure rates, are used with ethylene propylene diene monomer (EPDM) and latex compounds, and are believed to be less toxic than primary accelerators.

Demand for other processing chemicals -- including processing aids, adhesion promoters and blowing agents, among numerous others -- will reach almost 130,000 metric tons in 2015. Processing aids, used to improve plasticity and molding properties of rubber, are expected to see above average gains due to faster growth in usage of natural rubber. Natural rubber is difficult to process due to low plasticity, and therefore requires greater loadings of processing aids.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Rubber Processing Chemical Demand

Aggregate demand for rubber processing chemicals is forecast to increase from 3.2 million metric tons in 2010 to 8.5 million metric tons in 2015, accounting for 10.5 percent of total rubber consumption in that year. In 2010, the demand for rubber processing chemicals represented 10.5 percent of total rubber consumption. This growth is driven by the fact that China's rubber consumption is growing faster than the global average. In 2010, China's rubber consumption accounted for 10.5 percent of total rubber consumption.

SAMPLE TEXT

With rubber demand forecast to increase to 8.5 million metric tons in 2015, the Chinese rubber compounding sector will consume 4.93 parts of processing chemicals for every hundred parts of rubber at that time, a moderate increase over 2010 levels. In 2010, the average loading in China exceeded the global average, because the tire segment is disproportionately significant in China relative to the rest of the world. In 2015, the tire segment in China will account for over 70 percent of rubber consumption.

Both the tire and non-tire rubber processing chemical segments are forecast to climb at a strong pace, with the latter growing faster, from a much smaller base in 2010. Consumption of tire rubber in China is projected to advance 7.2 percent per year to 8.5 million metric tons in 2015, with non-motor vehicle tire rubber posting faster growth than rubber employed in motor vehicle tires. Continued growth in China's rubber processing chemical market will benefit consumption of antidegradants, with demand projected to increase 10.5 percent per annum to 379,000 metric tons in 2015.

Though smaller than the tire segment, non-tire rubber processing chemical demand in China is significant and accounted for more than one-quarter of total non-tire rubber market in 2010. Non-tire rubber demand is forecast to grow faster than tire rubber, reaching 3.2 million metric tons in 2015.

149

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TABLE VI-4

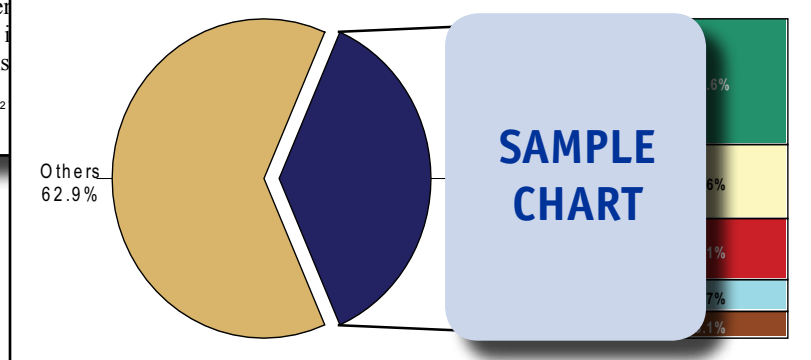
CHINA: RUBBER PROCESSING CHEMICAL DEMAND BY TYPE & MARKET (thousand metric tons)

Item	2000	2005	2010	2015	2020
Total Rubber Consumption					
Tire Rubber					
Non-Tire Rubber					
parts per hundred rubber (PHR)					
Rubber Processing Chemical Demand					
By Type:					
Antidegradants					
Accelerators					
Processing Aids & Other RPCs					
By Market:					
Tires & Tire Components					
Non-Tire Rubber Products					

SAMPLE TABLE

CHART VIII-1

WORLD RUBBER PROCESSING CHEMICAL SALES BY COMPANY (\$3.5 billion, 2010)



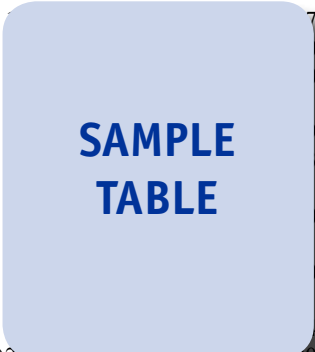
SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-3

CHINA: MARKET ENVIRONMENT FOR RUBBER PROCESSING CHEMICALS

Item	2000	2005	2010	2015	2020
Population (million persons)					
\$ GDP per capita					
Gross Domestic Product (bil 2009\$)					
motor vehicles per 000 capita					
motor vehicles per mil \$ GDP					
Motor Vehicles in Use (million)					
Motor Vehicle Production (000)					
kg rubber per capita					
Rubber Consumption (000 metric tons)	2,500	4,000	6,000	11,000	15,000



COMPANY PROFILES

Bann Química Limitada
 Avenida Roque Petroni Junior 1.089, Andar 10 - Sala 10
 São Paulo 04707
 Brazil
 55-11-3956-2000
 http://www.bann.com.br

Annual Sales:
 Employment:
 Key Products:

Bann Química produces a wide range of hydrogen and chemical raw materials for the rubber processing field.

The Company's rubber processing chemicals comprise antioxidants, accelerators and antiozonants. Antioxidants, which are marketed under the BANOX brand name, are made from dihydro-trimethyl quinoline and phenol compounds. BANOX dihydro-trimethyl quinoline compounds are designed to provide resistance to oxygen and heat degradation, while Bann Química's BANOX phenol compounds have applications in stain-free rubber processing. The Company's accelerators comprise mercaptobenzothiazole, mono- and disulfenamides, and tetramethyl thiuram mono- and disulfides. These accelerators, which are sold under the BANAC tradename, are utilized in rubber processing applications to speed up vulcanization reactions and efficiently make rubber. Bann Química's antiozonants are made from phenylenediamines in several types for use in tires and industrial rubber products.

These antiozonants are sold under the BANZONE brand name and are engineered to provide protection against ozone, heat and cracking. Rubber processing chemicals are manufactured by the Company at a

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"The non-tire rubber segment will grow as a result of China's expanding industrial base, which will create demand for such products as conveyor belts, impact-absorbing devices and factory flooring. In addition, continued growth in the Chinese motor vehicle industry will support increases in non-tire rubber sales. This growth in the non-tire segment is expected to drive demand for processing aids, blowing agents and adhesion promoters, which will make up the majority of demand for other rubber processing chemicals. The market for these is projected to total 38,000 metric tons in 2015."
 --Section VI, pg. 150

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Buy both **World Rubber & World Tires** for **\$8700**

World Rubber

Global rubber consumption is forecast to rise 4.3 percent annually through 2015 to 30.5 million metric tons, driven by increasing tire output as global motor vehicle production accelerates from a weak base. The Asia/Pacific market will remain dominant and grow the fastest. Non-tire rubber sales will outpace growth in tire rubber sales. This study analyzes the 24.8 million metric ton world rubber industry, with forecasts for 2015 and 2020 by market, world region and for 30 countries. The study also evaluates company market shares and profiles industry players.

#2843 March 2012..... \$5800

World Tires

World tire demand will rise 4.7 percent yearly through 2015 to 3.3 billion units. The large motor vehicle market will grow faster as motor vehicle industries rebound. Stronger growth will occur among industrial and other tires, including bicycle, motorcycle and off-road types. The Asia/Pacific region will remain the largest and fastest growing market. This study analyzes the 2.6 billion unit world tire industry, with forecasts for 2015 and 2020 by market, world region and for 30 major countries. The study also evaluates company market share and profiles industry competitors.

#2860 February 2012..... \$5800

World Specialty Silicas

World demand for specialty silicas will grow 5.6 percent annually to 2.8 million metric tons in 2016. Precipitated silica will remain dominant, with good growth fueled by the adoption of "green tires", especially in North America and the Asia/Pacific region. China will be the largest and fastest growing market. This study analyzes the 2.1 million metric ton world specialty silica industry, with forecasts for 2016 and 2021 by product, market, world region and for 16 major countries. The study also evaluates company market share and profiles industry players.

#2906 July 2012..... \$6100

World Industrial Rubber Products

The global market for industrial rubber products is projected to increase 5.8 percent per year to \$140 billion in 2016. The Asia/Pacific region -- the largest market -- is also forecast to post the best annual growth, led by China. The motor vehicle market will grow the fastest while industrial equipment remains the largest market. This study analyzes the \$105.5 billion world industrial rubber product industry, with forecasts for 2016 and 2021 by market, product, world region and for 27 countries. The study also evaluates company market shares and profiles industry players.

#2888 May 2012..... \$6100

About The Freedonia Group

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