World Thermoplastic Elastomers

Industry Study with Forecasts for **2019 & 2024**

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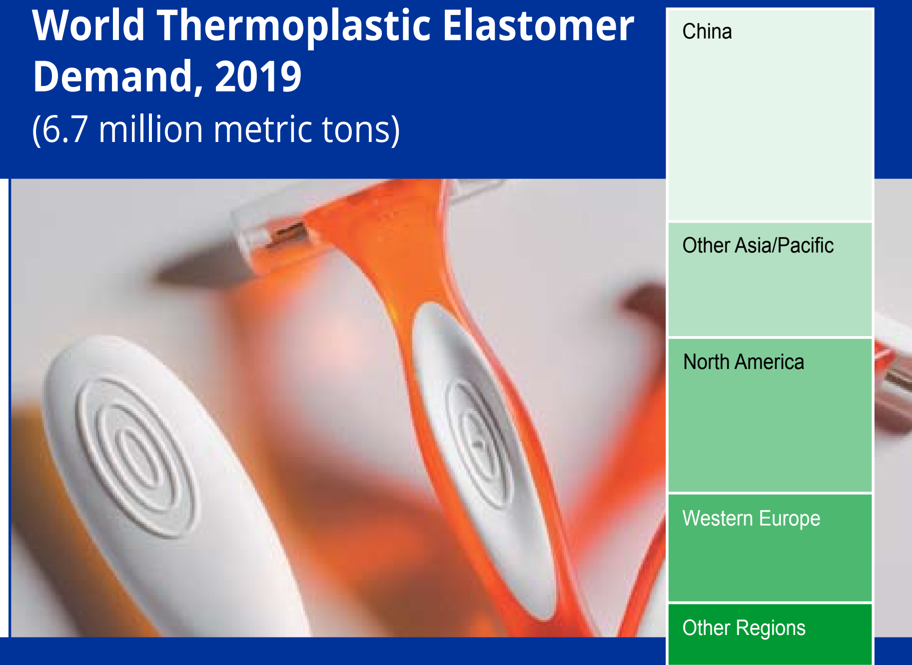
Advances will be driven by ongoing displacement of traditional elastomers and thermoplastics, especially in motor vehicles where TPEs can reduce weight to help meet more stringent fuel economy standards.

World demand to rise 5.2% annually through 2019

Global demand for thermoplastic elastomers (TPEs) is forecast to rise 5.2 percent per year to 6.7 million metric tons in 2019, valued at more than $24 billion. Advances will be driven by ongoing product innovation on the part of TPE manufacturers, which will allow these materials to continue to displace traditional elastomers and thermoplastics in a variety of applications. Additionally, TPE demand will benefit from the ongoing push to reduce motor vehicle weight, particularly as fuel economy standards around the world become more stringent. Growth will also be boosted by an improved economic outlook in North America and Western Europe, while advances in developing countries will benefit from increased adoption of TPEs over competing materials. Limiting further gains, however, will be a high degree of maturity in slower growing markets such as footwear and motor vehicle bumpers.

World Thermoplastic Elastomer Demand, 2019
(6.7 million metric tons)



Asia/Pacific to claim half of world demand by 2019

The Asia/Pacific region will remain the largest market for TPEs, rising at an above average pace to account for half of total world demand in 2019. China, the world's largest consumer of TPEs in volume terms, will see nearly eight percent annual growth. Regional gains will also benefit from robust expansion in India and Southeast Asia, although growth in the Japanese market will be sluggish. The Africa/Mideast region, which currently has the world's lowest TPE consumption levels per capita, will also produce above average advances in demand. TPE demand in North America and Western Europe will slow from the recovery-enhanced 2009-2014 performance, yet will still see healthy growth; however, these regions are expected to account for a smaller share of global TPE demand.

TPVs, POEs to be fastest growing TPE products

Styrenic block copolymers (SBCs) will remain the leading TPE product type through 2019. However, SBC demand will rise at a below average pace compared to TPEs overall, limited by a high degree of market saturation in many large volume applications. The fastest growth is expected for thermoplastic vulcanizates (TPVs), which are penetrating new applications in motor vehicle, consumer, and medical product markets. Strong gains are also forecast for polyolefin elastomers (POEs), a relatively new TPE product class which is gaining rapid acceptance as a performance additive for plastics and packaging adhesives. Continued strength in the motor vehicle industry will bolster demand for thermoplastic polyolefins (TPOs), although advances will be restrained by maturity in applications such as automotive bumper fascia.

World Thermoplastic Elastomers

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Sample Text, Table & Chart

ASIA/PACIFIC

India: Supply & Demand

Demand for TPE in India reached 128,000 metric tons v
SAMPLE TEXT
y percent of India's employment is
der comprising equal measures of
a ranked sixth in the world for pro
14, it ranked among the lowest of
TPE demand per capita and per do
ces utilitarian vehicle designs wh
so ranks low in TPE production, ah
Taiwan and Russia in 2014.

India's substantial activity in the footwear market led to
nence of SBCs as the most used TPE in 2014. Demand for S
twice that of the second largest product, TPOs, which are use
in motor vehicle and packaging markets. TPUs, another com
footwear, and POEs rounded out the list of substantial volum
The lack of penetration of TPE products in India is due to lin
ness and receptivity regarding their benefits. However, India
high in world manufacturing value added, following only Ch
US, so there is tremendous opportunity for TPE growth in In

To date, multinational TPE producers have not made many significant investments in production capacity in India, focusing more on China and Southeast Asia. Additionally, there have not been any domestic-based firms with significant TPE production capacity since ATV Projects India shuttered its SBS plant in Nagothane in 2004. Among the foreign companies producing TPEs in India is Bayer, which operates a TPU manufacturing plant in Cuddalore. Multibase (Dow Corning
compounding facility in Daman. Additionally, Hydro S&S I
India-based supplier of compounds for the automotive indus
HYPRENE TPEs at facilities in Jejuri, Puducherry, and Pudu

TABLE IX-4

BRAZIL: THERMOPLASTIC ELASTOMER DEMAND BY PRODUCT & MARKET (thousand metric tons)

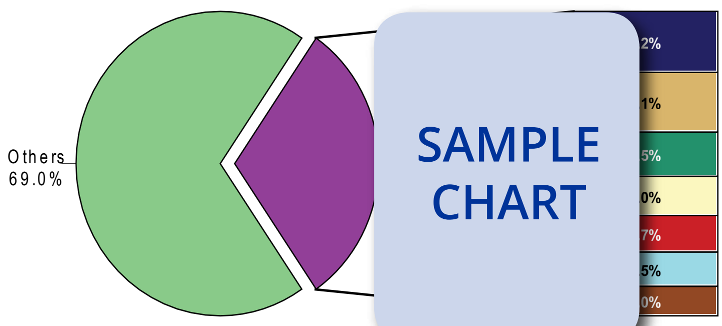
Item	2004	2009	2014	2019	2024
Manufacturing Value Added (bil 2013$)					
kg TPE/000$ MVA					
Thermoplastic Elastomer Demand					
By Product:					
Styrenic Block Copolymers (SBCs)					
Thermoplastic Polyolefins (TPOs)					
Polyolefin Elastomers (POEs)					
Thermoplastic Polyurethanes (TPUs)					
Thermoplastic Vulcanizates (TPVs)					
Copolyester Elastomers (COPEs)					
Other TPEs					
By Market:					
Motor Vehicles					
Consumer Goods					
Asphalt & Roofing					
Adhesives, Sealants, & Coatings					
Industrial Products					
Other Markets					
$/kg					
Thermoplastic Elastomer Demand (mil $)					

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART X-1

WORLD THERMOPLASTIC ELASTOMER MARKET SHARE, 2014 ($17.6 billion)



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Sample Profile & Table, & Study Coverage

TABLE VII-7

**UNITED KINGDOM:
THERMOPLASTIC ELASTOMER SUPPLY & DEMAND**

Item	2004	2009	2014	2019	2024
Population (million persons)					
$ GDP/capita					
Gross Domestic Product (bil 2013$)					
Manufacturing Value Added (bil 2013$)					
Construction Expenditures (bil 2013$)					
Motor Vehicle Production (000 units)					
kg TPE/capita					
kg TPE/mil $ GDP					
TPE Demand (000 metric tons)					
net exports					
TPE Production (000 metric tons)					

Source: The Freedonia Group, Inc.

SAMPLE TABLE

COMPANY PROFILES

KRAIBURG Holding GmbH & Company KG
Teplitzer Straße 20
84478 Wald
Germany
49-8638-
http://wv

Sales: $ ... y)
Employ ... y)

Key Proc ... ydrogenated styrenic block co ... olefins, paraffinic white oils, ... ditives

SAMPLE PROFILE

KRAIBURG Holding is a privately held firm primarily engaged in rubber compounding. The Company also produces tire retreading products, thermoplastic elastomers (TPEs), and other related materials.

The Company is active in the world TPE industry through the KRAIBURG TPE GmbH & Company KG subsidiary (Germany), which had sales of $183 million and employed more than 440 in 2014. KRAIBURG TPE produces TPEs based on hydrogenated styrenic block copolymers (SBCs), thermoplastic vulcanizates (TPVs), polyolefins, paraffinic white oils, inorganic bulking agents, and other additives. These TPEs are available under the THERMOLAST K, THERMOLAST M, THERMOLAST V, THERMOLAST A, THERMOLAST W, HIPEX, COPEC, and FOR-TEC E brand names.

TPE Products -- THERMOLAST K TPEs, which are based on hydrogenated SBCs, are formulated to offer high thermal stability and low-temperature elasticity. These compounds are suitable for use in the automotive, industrial, and commercial markets. KRAIBURG TPE's

335

STUDY COVERAGE

This Freedonia study, ***World Thermoplastic Elastomers***, offers historical data (2004, 2009, 2014) plus forecasts (2019, 2024) for supply and demand, as well as demand by product and market, in six regions and 15 countries. The study also considers market environment factors, examines industry structure, details company market share and profiles 40 global industry competitors.

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Related Studies

Custom Thermoplastic Compounding

US demand for custom compounded thermoplastics will rise 3.2 percent annually to 10.6 billion pounds in 2019, valued at nearly $19 billion. The construction market will grow the fastest, nearly twice the pace of the next fastest growing market, wire and cable. Compounded thermoplastic PVC will continue to offer the best growth opportunities. This study analyzes the 9.1 billion pound US custom compounded thermoplastic industry, with forecasts for 2019 and 2024 by resin and market. The study also evaluates company market share and profiles industry players.

#3336..............October 2015..................$5300

Fluoropolymers

US demand for fluoropolymers will rise 5.3 percent per year to $2.3 billion in 2019, with volume totaling 180 million pounds. Polytetrafluoroethylene (PTFE) will remain the largest value segment, while polyvinylidene fluoride (PVDF) and polyvinyl fluoride (PVF) will grow at the fastest rates. The construction and electrical/electronic markets will grow the fastest. This study analyzes the $1.8 billion US fluoropolymer industry, with forecasts for 2019 and 2024 by product, application and market. The study also evaluates company market share and profiles industry players.

#3278..................June 2015.....................$5300

World Silicones

World demand for silicones will rise 5.7 percent annually to $19.3 billion in 2019. The Asia/Pacific region will continue to be the strongest source of additional silicone demand, with electronics remaining its largest outlet. Construction will be the fastest growing market worldwide, with silicone gels among the fastest growing product types. This study examines the $14.6 billion world silicones industry, with forecasts for 2019 and 2024 by market and product for 6 world regions and 15 countries. The study also evaluates company market share and profiles industry participants.

#3277.................. May 2015.....................$6400

Engineering Plastics

Demand for engineering plastics in the US is expected to rise 2.6 percent per year to 5.1 billion pounds in 2019. Nylon, ABS, and polycarbonate will remain the three largest engineering plastics by volume, with nylon the fastest growing of the three. Smaller-volume engineering plastics such as polyphenylene sulfide, sulfone polymers, and fluoropolymers will grow the fastest. This study analyzes the 4.5 billion pound US engineering plastic industry, with forecasts for 2019 and 2024 by resin and market. The study also evaluates company market share and profiles industry players.

#3242..................April 2015 ....$5300

World Polyethylene

Global polyethylene demand will rise 4.0 percent yearly to 99.6 million metric tons in 2018. The Asia/Pacific region will remain the largest and fastest growing market, driven by China. Following a decade of decline, North America will add nine million tons of production capacity through 2023. This study analyzes the 82 million metric ton world polyethylene industry, with capacity, production and demand forecasts for 2018 and 2023 by product, market, world region, and for 27 countries. The study also evaluates company market share and profiles industry players.

#3210..............October 2014..................$6200

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