

# World Rubber Processing Chemicals

Industry Study with Forecasts for 2020 & 2025

Study #3434 | July 2016 | \$6100



Broad trends that influence demand for rubber used in tires and industrial products will have a strong impact on rubber processing chemicals. For example, rising motor vehicle ownership rates in developing nations will support local tire production, necessitating additional consumption of processing chemicals. Non-tire rubber chemical demand will also benefit from a healthy outlook for world motor vehicle production, as well as continuing industrialization in the developing world.

## Performance requirements to affect chemical demand

Global trends toward higher performance requirements and longer service lives expected of tires and other rubber goods will further drive demand. Premium tires, which consume higher loadings of antidegradants in their formulation, will capture an increasing share of the world market. Demand growth for accelerators will also outpace rubber consumption gains, with these advances resulting from the use of more complex curing systems involving secondary or ultra-accelerators, which are frequently used in more specialized formulations. Demand for other processing chemicals, including non-sulfur curing agents, processing aids, adhesion promoters, and various other types, will also see healthy increases through 2020. Organic peroxide cure agents, used instead of sulfur to cure some synthetic elastomers, will see above average growth due to rising demand for more specialized rubber

products and because of their ability to provide superior product performance characteristics.

## China's challenges cause concern

Economic growth in China has decelerated in recent years as the country faces challenges related to its real estate and financial markets. This is a significant concern for the rubber processing chemical industry. However, the Chinese rubber market is expected to remain healthy through 2020 as motor vehicle production remains strong, and the country is forecast to contribute nearly half of incremental global demand growth. Both Japan and Western Europe are expected to exhibit a reversal from declines in rubber processing chemical demand experienced between 2010 and 2015, while US demand accelerates due to improving market conditions.

## Study coverage

This study analyzes the world rubber processing chemical market. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by market (tires and tire products, non-tire rubber products) and product (antidegradants, accelerators, processing aids and other) in 6 regions and 21 countries. The study also considers market environment factors, assesses industry structure, evaluates company market share and profiles 19 industry competitors worldwide.

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Industry Study with Historical Data for 2005,  
2010 & 2015 plus Forecasts for 2020 & 2025

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Rubber Processing Chemical Markets

Rubber Processing Chemical Products

Suppliers

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Central & South America

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**WESTERN EUROPE**

**Western Europe: Rubber Processing Chemical Markets**

West European rubber consumption is expected to grow moderately through 2020 to overtake slowest growth of any region. Demand for rubber processing chemicals over declines during the period, posting growth until 2015.

The West European market is driven by a number of factors, including population growth, GDP, and manufacturing; and a mature market moving production to other regions. However, consumption is supported by a continued rebound in non-tire rubber within a favorable environment.

Demand for rubber processing chemicals is expected to rise around 1% annually through 2020, the slowest pace among all the regions of the world and generally mirroring the relatively slow growth in rubber consumption. Over the past two decades or so, the West European rubber market has undergone a structural shift, with overall consumption declining and tire production moving to foreign countries, particularly in Asia. However, the region is still a major producer and exporter of industrial rubber goods, including many high performance products that require above average processing chemical loadings. Similarly, the tires that continue to be produced in Western Europe are often premium tires, which similarly consume slightly larger volumes of processing chemicals than do lower performance commodity tires.

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**TABLE V-1**

**WESTERN EUROPE: RUBBER PROCESSING CHEMICAL DEMAND BY MARKET (thousand units)**

Item	2005	2010	2015	2020	2025
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2014\$)					
motor vehicles in use per 1000 capita					
motor vehicles in use per mil \$ GDP					
Motor Vehicles in Use (million)					
Motor Vehicle Production (000)					
Rubber Consumption					
Tire Rubber					
Non-Tire Rubber					
Rubber Processing Chemical Demand					
Tires & Tire Components					
Non-Tire Rubber Products					

Source: The Freedonia Group

**TABLE III-3**

**WORLD RUBBER PROCESSING CHEMICAL DEMAND IN TIRE PRODUCTION (thousand units)**

Item	2005	2010	2015	2020	2025
Tire Rubber Consumption					
parts per hundred rubber (PHR):					
total processing chemicals					
antidegradants					
accelerators					
other chemicals					
Rubber Processing Chemical Demand					
Antidegradants					
Accelerators					
Processing Aids & Others					
% tire rubber					
World Rubber Processing Chemical Demand					

Source: The Freedonia Group

**This study can help you:**

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

## Related Studies

### World Specialty Silicas

World demand for specialty silicas is forecast to rise 5.0 percent per year to 3.5 million metric tons in 2020, valued at \$8.8 billion. The tire rubber market will grow the fastest. The most rapid gains for specialty silicas will occur in industrializing countries in Asia, since the region dominates global rubber production. This study provides forecasts (2020, 2025) by product and market in 6 regions and 16 countries. The study also considers market environment factors, examines the industry structure, evaluates company market share, and profiles global industry players.

#3407..... April 2016 ..... \$6400

### World Rubber

World demand for rubber is forecast to increase 3.9 percent annually to 31.7 million metric tons in 2019. The share of tire and non-tire applications will remain steady, as will the balance between synthetic and natural rubber. The Asia/Pacific region will be the largest and fastest growing market. This study analyzes the 26 million metric ton world rubber market, with forecasts for 2019 and 2024 by type and application for six world regions and 23 major countries. The study also evaluates company market shares and profiles industry participants.

#3381..... February 2016 ..... \$6300

### Specialty Silicas

Demand for specialty silicas in the US is forecast to rise 4.7 percent annually to \$2.1 billion in 2019. Precipitated silica will be the largest and fastest growing product segment, driven by robust gains in the large tire rubber sector, as well as in coatings and inks. Rubber will also be the fastest growing market overall, with tire rubber outpacing the nontire rubber segment. This study analyzes the \$1.7 billion US specialty silica industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3368..... January 2016 ..... \$5200

### World Tires

Worldwide demand for tires is projected to increase 4.1 percent annually to 3.0 billion units in 2019. Motor vehicles will remain the dominant tire market, while motorcycles and other applications will grow the fastest. The Asia/Pacific region will remain the largest tire market, with China, India, Indonesia and Thailand among the best opportunities. This study analyzes the 2.5 billion unit world tire industry, with forecasts for 2019 and 2024 by market for six world regions and 25 major countries. The study also evaluates company market share and profiles industry competitors.

#3357..... November 2015 ..... \$6400

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

## About The Freedonia Group

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