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Oliver Kutsch, CEO

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Our Market Studies

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Carbon black is produced in large quantities by the incomplete combustion of hydrocarbon. In tires and numerous other rubber products, carbon black mainly serves as a filler. In plastics, paints, coatings, and printing inks, carbon black is used as a black pigment.

The market researchers of Ceresana examined the global carbon black market already for the third time. They expect a positive development of carbon black demand until 2025: an increase to a total volume of over 15 million tonnes.

**Highest Demand in Asia-Pacific**

The industry in the region Asia-Pacific accounted for more than 62% of total global carbon black consumption in 2017. Due to above-average growth rates, its market share will increase to about 65% until 2025. In Asia, China is by far the major consumer of carbon black utilizing 4.7 million tonnes. Ceresana forecasts another growth of Chinese demand for the years to come. The region accounting for the second highest carbon black demand in 2017 was North America, followed closely by Western Europe.

**Globally Rising Production**

Production of carbon black increases all over the world. Asia-Pacific is not only leader in consumption but also in production: More than 64% of the total amount of carbon black produced in 2017 was manufactured in this region. North America ranked second at a considerable distance, followed by Eastern Europe. Due to an increase in capacity of over 1.5 million tonnes, mainly in China and India, the region Asia-Pacific will continue to increase its production – presumably to more than 10 million tonnes in 2025.

**No Tires Without Carbon Black**

By far, the most important application area of carbon black are tires. They are mainly made of the rubber types SBR, BR, and natural rubber. A major part of carbon black demand is thus accounted for by these elastomer types. Around 9 million tonnes were processed in tires worldwide in 2017. Rubber products for industry and construction ranked second. Carbon Black is processed in a wide range of products that are used in the chemical industry, mechanical engineering, the construction industry as well as the electrical and electronics industry. Products include conveyor belts, roll coverings, tubes, profiles, seals, cables, moldings, and roofing foils. The use of Carbon Black as a black pigment in printing inks, plastics as well as paints and coatings currently represents only a small share of the total market volume.

**The Study in Brief:**

Chapter 1 provides a description and analysis of the global carbon black market – including forecasts up to 2025: The development of revenues, demand, production, and capacities is analyzed for each region.

Chapter 2 offers a detailed analysis of the carbon black market in the 21 major countries: Demand, revenues, production, carbon black manufacturers as well as import and export are evaluated. Demand will be analyzed in detail for the segments tires, rubber – automotive, rubber – industry and construction, rubber – others, plastics, printing inks, and paints and coatings.

Chapter 3 includes an in-depth analysis of sales markets and application areas of carbon black. Data on demand development are analyzed, split by Western Europe, Eastern Europe, North America, South America, Asia-Pacific, the Middle East and Africa.

Chapter 4 provides profiles of the largest manufacturers of carbon black – clearly arranged according to contact details, turnover, profit, product range, production sites, capacities, and profile summary. Detailed profiles are given for 70 manufacturers including Aditya Birla, Bridgestone, Cabot, China Synthetic Rubber, Jiangxi Black Catd., OCI, Omsk Carbon, Orion Engineered Carbons, Phillips Carbon Black, Sid Richardson, and Tokai Carbon.

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1.2.1 Western Europe - Demand and Revenues

Demand for carbon black in Western Europe amounted to approximately XXX million tonnes in 2017. Until 2025, we expect an increase in demand by XXX% p.a. Given this growth rate, Western Europe's share of global demand is likely to decline from XXX% in 2017 to roughly XXX% in 2025.

Graph: Demand for carbon black in Western Europe from 2009 to 2025

About XXX% of Western European demand originated in Germany. The remaining Western European countries (Sweden, Austria, Portugal, Belgium, Denmark, Switzerland, Finland, Norway, and Ireland) reached an aggregated market share of XXX%.

The most dynamic growth rate of XXX% p.a. in the upcoming eight years is projected for Germany.

About EUR XXX billion were generated with the sale of carbon black in Western Europe in 2017. We forecast the market value to increase by XXX% p.a. in the next eight years.

1.2.2 Production and Capacities

Carbon black output totaled XXX tonnes in 2017. Accounting for a share of XXX% of total Western European production in 2017, Germany was the largest producer in this region.

We expect the production volume in Western Europe to decrease at rates of XXX% p.a. until 2025.

Graph: Production of carbon black in Western Europe from 2009 to 2025

Chapter 1: Market data for 7 world regions:
- Western Europe
- Eastern Europe
- North America
- South America
- Asia-Pacific
- Middle East
- Africa

Chapter 2: Analyses and forecasts for 21 countries:
- Demand
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Table: Demand for carbon black in Western Europe from 2009 to 2025 – split by major countries

Table: Production of carbon black in Western Europe from 2009 to 2025 – split by countries
3.1 Applications - World

Around XXX million tonnes of carbon black were consumed worldwide in 2017. The most important application areas are the segments tires, rubber for the automotive industry, rubber for industry and construction, rubber for other sectors, plastics, printing inks as well as paints and coatings. The most important sales market in 2017 was the segment tires with approx. XXX% of total global consumption.

Graph: Global demand for carbon black from 2009 to 2025 – split by applications

We forecast global demand to increase to approx. XXX million tonnes until 2025. The sector printing inks is likely to develop at the most dynamic growth rates of XXX% p.a. between 2017 and 2025; however, this development is based on relatively low absolute figures, this sector will still account for the lowest demand in 2025. We forecast positive growth rates for all other applications as well. Overall, we expect total demand to rise at average rates of XXX% p.a. during the upcoming eight years.

3.1.1 Tires

Tires are mainly made of the rubber types SBR, BR, and natural rubber. A major part of carbon black demand is thus accounted for by these elastomer types. Styrene butadiene rubber (SBR) is a copolymer derived from butadiene and styrene. SBR is produced by emulsion polymerization (E-SBR) or solution polymerization (S-SBR). This type of rubber offers a high abrasion resistance as well as a high resistance against heat and cold. While E-SBR is mainly used for standard tires, S-SBR is needed to manufacture tires with high abrasion resistance and low rolling friction. Polybutadiene rubber (BR) is formed by the polymerization of butadiene. Products made of BR offer very high resilience, good insulation properties, abrasion resistance, and remain flexible at low temperatures. In order to improve the characteristics of final products even further, BR is often mixed with natural rubber or SBR. As is the case with SBR, BR is mainly used in the tire industry, especially for the walls of tires.

In 2017, almost XXX million tonnes of carbon black were used for the sales market tires. Given a XXX% p.a. increase, global demand will amount to approx. XXX tonnes in 2025.

Graph: Global demand for carbon black from 2009 to 2025 – split by regions
Chapter 4: Data and facts on 70 producers, clearly arranged by:
- Financial key data
- Production sites & capacities
- Profile summary

This study is useful for:
- Producers, traders and converters of plastics, printing inks, paints and coatings as well as elastomers such as styrene butadiene rubber (SBR), butadiene rubber (BR), acrylonitrile butadiene rubber (NBR), ethylene propylene diene monomer (EPDM) rubber, etc.
- Companies operating in the fields of: Tires and other rubber goods such as tubes, seals, cables, conveyor belts, roll coverings, consumer goods, profiles, adhesives, moldings, roofing foil, floorings, protective clothing, soles, gloves and other textiles, leisure products, and sporting goods
- Associations and institutes, investors and consultations
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| Bags & Sacks - Europe | Plastic Pipes - Europe |
| Bags & Sacks - World | Plastic Pipes - World |
| Biocides - World | Plastic Windows - World |
| Bioplastics - World | Plasticizers - World |
| Bitumen - Europe | Plastics - Europe |
| Butadiene - World | Plastics - World |
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