Market Study: Synthetic Rubber (3rd ed.)

Ceresana
Market Research Since 2002
Dear decision-makers,

our studies provide you with the reliable data and forecasts that enable a secured strategic planning for your company. Our proven expertise as well as country-specific and global analyses supply the basis for your market success. Thus, you can strengthen your competitive position even in the face of increasing market dynamics!

Our experienced team of experts uses profound industry knowledge. We conduct primary and secondary research by means of objective surveys, analyses, forecasts, and preparation of relevant data. With 160 market studies, Ceresana is one of the globally leading market research institutes for the industrial sector.

Our market expertise supports you in reaching your goals:

Get a better understanding of the market!

How does the global market develop?
Where are potential future markets?
Where are opportunities and risks?
How high is the market growth per country?
What are the current economic, political, and industry-specific trends?

Keep the focus on competition!

What do competitors offer their clients?
Are there product innovations?
Where are new market entries or M&A?
How are competitors positioned?

Thoroughly analyze your value chain!

Where do ideal procurement, production, and sales conditions prevail?
What are the most important market actors?
Are imports or exports advisable?
Who are the possible business partners for cooperations?

Identify demand and customers!

What are possible application areas?
Who are the most important customers?
Where are further target groups?
What is the trend of demand?
Elastically deformable plastics have been necessary for several technical applications but also for various everyday objects. Per year, more than 12.7 million tonnes of these types of polymers are consumed worldwide. Ceresana analyzed the global market for synthetic rubbers already for the third time. These include styrene-butadiene rubber, butadiene rubber, ethylene-propylene-diene rubber, acrylonitrile-butadiene rubber, chlorobutadiene, and polyisoprene. The current study deals with data for the years starting in 2009 and forecasts data until 2025. All information on demand, production, import, and export are indicated in tonnes and the revenues in the currencies US dollar and euro.

Vehicle Tires are Main Application

Demand for synthetic rubbers in this report is split by the application areas tires, automotive applications, industry and construction, modification of materials (that is the admixture with other materials) as well as by the group of other applications. The most important sales market in 2017 was the segment tires: 58% of total global demand were accounted for by applications in original equipment and replacement tires. Rubbers are also used for numerous other products in the automotive industry: for example for hoses, cables, seals as well as window and door profiles. For the automotive segment, the analysts of Ceresana expect an increase of global rubber demand by 3.0% per year until 2025.

Engineering Rubber Products

The second largest application area for rubbers are elastically deformable engineering products with a stable shape such as conveyor belts, roll covers, hoses, profiles, seals, cables, molded parts, and roofing films. Ranging from the chemical industry, engineering, and construction to electrics and electronics, increasing number of rubber products are needed. For the period until 2025, we expect global demand for rubber in the segments industry and construction to increase by 2.4% p.a.

Market Leader Styrene-Butadiene Rubber

By far, the most important rubber type is styrene-butadiene rubber (SBR): about 5.1 million tonnes were processed in 2017. SBR is produced by emulsion polymerization (E-SBR) or solution polymerization (S-SBR). While E-SBR accounts for approx. 72% of total SBR demand, the market for S-SBR develops at significantly more dynamical growth rates of 3.8% p.a. The tire industry is the dominating sales market for these two products as well as for butadiene rubber (BR), butyl rubber (IIR), and polyisoprene (IR). A different picture is presented in the case of ethylene-propylene-diene rubber (EPDM), chlorobutadiene rubber (CR), and acrylonitrile-butadiene rubber (NBR): These rubber types are mainly used in industrial and construction products as well as for modification of other materials.
The Study in Brief

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

Chapter 2 offers a detailed analysis of 25 countries: Demand, export, import, production, capacities, and revenues in regard to rubber. In addition, these countries are also analyzed regarding application areas. Market data on demand are split by types of rubber for each country.

Chapter 3 analyzes the different types of application areas of rubber in detail: Data and influential factors on application in tires, automobiles, industry and construction products, modification of materials as well as other applications.

Chapter 4 analyzes demand for rubber split by the types styrene-butadiene rubber (E-SBR), styrene-butadiene rubber (S-SBR), polybutadiene rubber (BR), ethylene-propylene-diene rubber (EPDM), butyl rubber (IIR), acrylonitrile-butadiene rubber (NBR), polychloroprene rubber (CR), and polyisoprene rubber (IR).

Chapter 5 offers a useful directory of the 67 most important rubber producers, clearly arranged according to contact details, revenues, profit, product range, production sites, profile summary, and information on capacities. The most important manufacturers include: Arlanxeo, ExxonMobil, Good-year, JSR, Kumho Nizhnemanskneftekhim, PetroChina, Sinopec, Synthos, and Versalis.
Key Figures of the Study

The following table provides an overview of all figures included in this study, referring to the years 2009 to 2025. A check mark was put for each region and country (country code according to ISO-3166 Alpha-2) as well as for the world as a whole if the figures are included. Revenues are indicated in euros and US-dollars, demand and production volume as well as trade figures in metric tonnes.

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This study is particularly useful for

- Producers, traders, and converters of rubbers such as styrene-butadiene rubber (SBR), butadiene rubber (BR), ethylene-propylene-diene rubber (EPDM), butyl rubber (IIR), acrylonitrile-butadiene rubber (NBR), chlorobutadiene and polyisoprene (CR & IR).
- Companies operating in the fields of: Tires and other rubber products such as hoses, gaskets, cables, consumer goods, profiles, molded parts as well as leisure and sports goods.
- Construction companies, service providers, machine and plant manufacturers
- Associations and institutes
- Executive board, production and technology, strategic planning, R&D, market research, marketing, sales and distribution, procurement

Yours Oliver Kutsch, CEO

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- Automotive Coatings - World
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