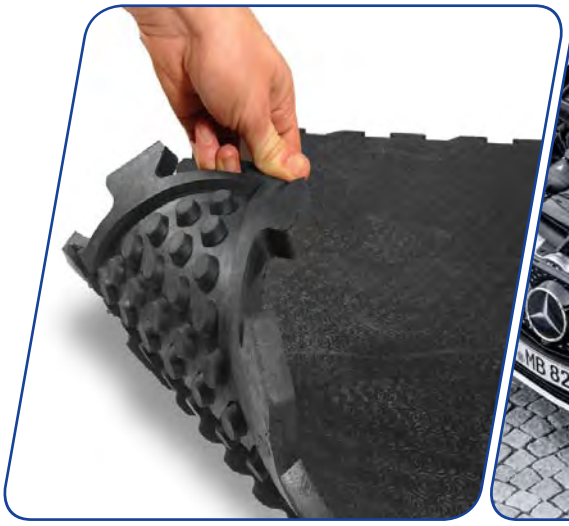
Market Study: Butadiene Rubber (BR)



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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!

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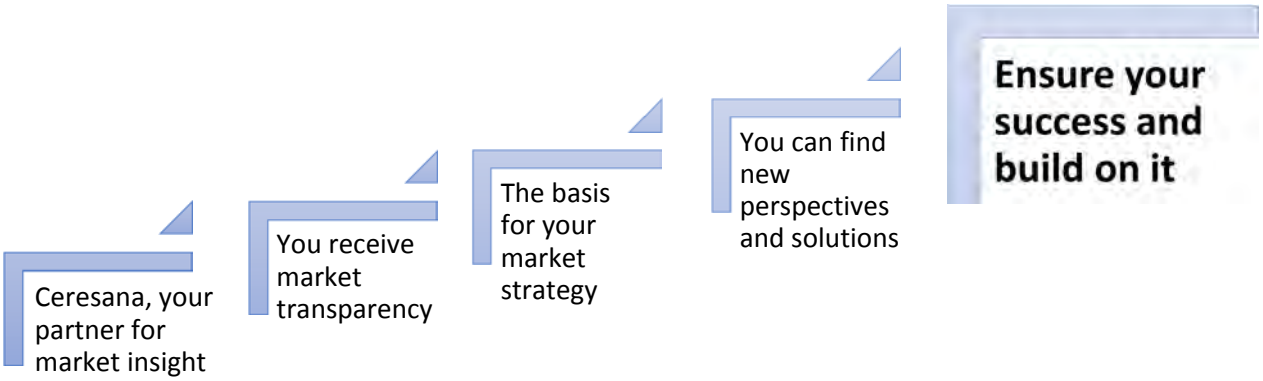

Get a better understanding of the market!

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?

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?

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?

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?

MADE IN GERMANY

As measured by the global turnover, butadiene rubber (BR) is the second most important rubber after styrene-butadiene rubber (SBR). 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. According to the most recent study by Ceresana, worldwide consumption for this elastomer type amounts to about 3.44 million tonnes per year. The region Asia-Pacific accounted for over 57% of global revenues, followed at a large distance by North America and Western Europe. Ceresana expects the revenues generated with BR to increase by, on average, 4.1% per year until 2025.

Tires and Plastic Modification Are Main Applications

The dominating sales market for BR is the segment automotive tires with a share of about 73 % of total global demand. Besides SBR, natural rubber, and carbon black, BR is the most important ingredient for tire manufacture. In 2025, tire manufacture is likely to consume 2.9 million tonnes of BR. However, the end use market with the highest percentage growth, 2.2% per year on average, is the modification of engineering plastics. The mechanical properties of high impact polystyrene (HIPS) and acrylonitrile butadiene styrene (ABS) in particular can be improved by BR.

Rubber Products of all Kinds

Several industrial sectors, ranging from the chemical industry, engineering, construction, leisure products, and sports goods to electrics and electronics, require BR for a variety of products. In 2017, about 433,000 tonnes were utilized worldwide in this sector.

The Study in Brief:

Chapter 1 provides a description and analysis of the global BR 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 18 countries: Demand, export, import, output, capacities, and turnover in regard to BR. In addition, these countries are also analyzed regarding application areas.

Chapter 3 analyzes the different types of application areas of BR in detail: Data and influential factors regarding the use in tires, modification (ABS, HIPS), and in other sales markets (such as construction, engineering, leisure and sports goods as well as the electrical and electronics industry).

Chapter 4 offers a useful directory of the 33 most important BR 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 Holding BV, Asahi Kasei, Bridgestone Corporation, Goodyear Tire and Rubber Company, JSR Corporation, LG Chem Ltd., PetroChina, and Sinopec Corp.

Market Study: Butadiene Rubber (BR): 18 Countries, 33 Producers; 230 Pages

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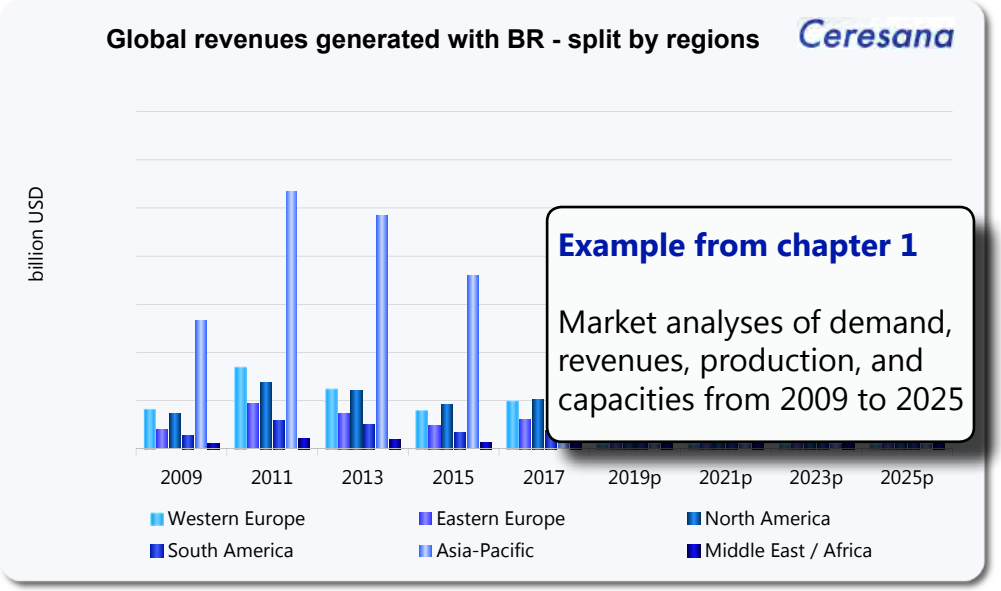

Example from chapter 1

Market analyses of demand, revenues, production, and capacities from 2009 to 2025

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South Korea (3)
Taiwan (2)
Thailand (1)

4.5 Middle East
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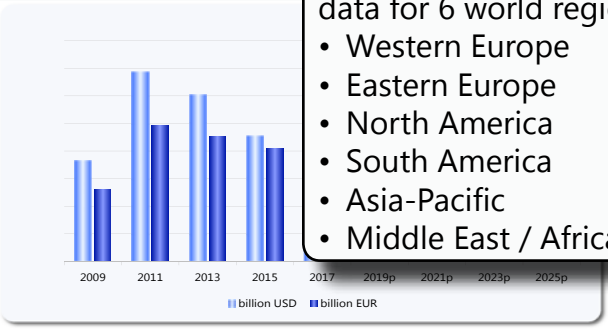
Saudi Arabia (1)

1.4 North America

Around X tonnes of BR were used in North America in 2017. North America is the second largest sales market, surpassed only by Asia-Pacific. The North American demand is dominated by the USA; this country accounts for about X% of total demand. We expect demand to increase to approx. X tonnes during the next eight years. Given the below average growth rate, North American share of global demand is likely to fall to about X% in 2025. The market value of BR sold in North America rose to USD X billion in 2017.

Chapter 1: Market data for 6 world regions:
- Western Europe
- Eastern Europe
- North America
- South America
- Asia-Pacific
- Middle East / Africa



Graph: Revenues generated with BR in North America from 2009 to 2025 in million USD and million EUR

in 1,000 tonnes	2009	2011	2013	2015	2017	2019p	2021p	2023p	2025p	2017-2025
Canada	X	X	X	X	X	X	X	X	X	X% p.a.
Mexico	X	X	X	X	X	X	X	X	X	X% p.a.
USA	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

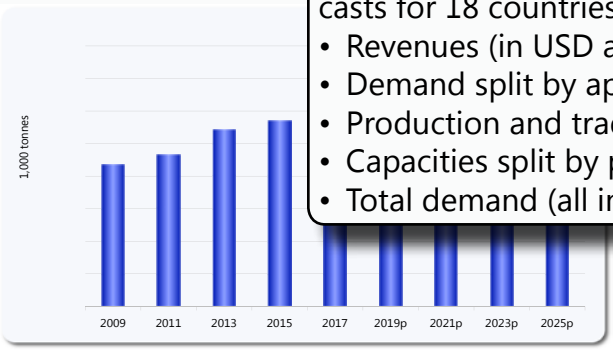
Table: Demand for BR in North America from 2009 to 2025 – split by major countries

2.5.1.1 China – Demand and Revenues

In 2017, demand for BR amounted to X million tonnes. We forecast demand in China to continue to rise by X% p.a. to approx. X tonnes in 2025.

At a dynamic growth rate, revenues rose to USD X billion in 2017. This market value corresponded to roughly X% of overall revenues in Asia-Pacific. Revenues will rise to approx. USD X billion in 2025. This corresponds to a growth rate of an average of X% per year.

Chapter 2: Analyses and forecasts for 18 countries:
- Revenues (in USD and EUR)
- Demand split by applications
- Production and trade
- Capacities split by producer
- Total demand (all in tonnes)



Graph: Demand for BR in China from 2009 to 2025

in 1,000 tonnes	2009	2011	2013	2015	2017	2019p	2021p	2023p	2025p	2017-2025
Tires	X	X	X	X	X	X	X	X	X	X% p.a.
Modification	X	X	X	X	X	X	X	X	X	X% p.a.
Industry & Others	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand for BR in China from 2009 to 2025 – split by applications

Reporting a market volume of X tonnes in 2017, the segment tires accounted for the major share of Chinese demand. The highest percentage increase between 2017 and 2025 is forecast for the segment modification. Revenues are projected to increase at an AAGR of X%.

The government dissociates from quantitative growth objectives and tends to more sustainability and quality. More attention will be paid to environmental and social issues in the future. This new course corresponds to low growth rates. In 2016, China registered the lowest economic growth since 1990 at a rate of 6.7%. In 2017, a growth of 6.8 % could be observed. Among others, private consumption is responsible for the increased growth which in turn is due to rising disposable income. The state mainly invests in future industries and consumption-oriented segments. Investments in more traditional branches such as mining and steel are decreasing. We expect a GDP growth of 6.5% in 2018, but depending on the extent to which US President Trump introduces protectionist measures, this will affect the Chinese economy in 2018.

By now, growth rates of the automotive industry are not as high as in the previous years. While a total of 28.1 million vehicles were produced in 2016, output figures amounted to 28.3 million vehicles in 2017. Due to saturation effects, demand for passenger cars declined in 2017. An increase in demand for used vehicles could be observed, which led to a decline in demand for new vehicles. However, passenger car sales increased slightly. This can be traced back to the positive sales increases of SUVs as well as to an upswing of the demand for utility vehicles. In 2018, tax incentives will expire, the market for used vehicles will continue to grow, and registration restriction will increase further. These developments will diminish the growth of the automotive market in the years to come. In China, interest in electric vehicles is growing. Starting 2019, all manufacturers and importers producing more than 30.000 vehicles a year will have a quota for electric cars.

2.5.1.2 Production, Capacities, and Trade

BR output amounted to almost X tonnes in 2017. Production volume in China is expected to increase at above-average in the upcoming years. We forecast production volume to rise to almost X million tonnes in 2025. This corresponds to a growth rate of, on average, X% per year. About X tonnes were exported in 2017, while X tonnes were imported.

Company	in tonnes
XXX	X
XXX	X
XXX	X
XXX	X
XXX	X
XXX	X
XXX	X
XXX	X
XXX	X
Total	**X**

Table: Capacities of BR in China in 2017 – split by producers

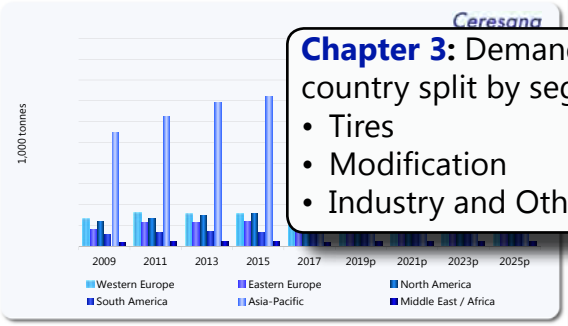
3 Applications

3.1 Welt

3.1.1 Tires

In 2017, almost X million tonnes of carbon black were used for the sales market tires. Given a X% p.a. increase, global demand will amount to X million tonnes in 2025. Besides SBR, natural rubber, and carbon black, BR is the most important ingredient for tire manufacture.

Additional information on the global market for SBR, carbon black, and rubber is provided in the market studies "**Styrene-Butadiene Rubber (SBR)**", "**Carbon Black (3rd edition)**" as well as "**Synthetic Rubber (2nd edition)**" by Ceresana.



Graph: Global demand for BR in the segment tires from 2009 to 2025 – split by regions

Chapter 3: Demand per region & country split by segments:
- Tires
- Modification
- Industry and Other Applications

3.1.2 Modification

Worldwide, approx. X tonnes were utilized in the segment modification (plastics such as ABS and HIPS in particular) in 2017. We forecast global consumption to increase at an average rate of X% p.a. to a volume of approx. X tonnes in 2025.

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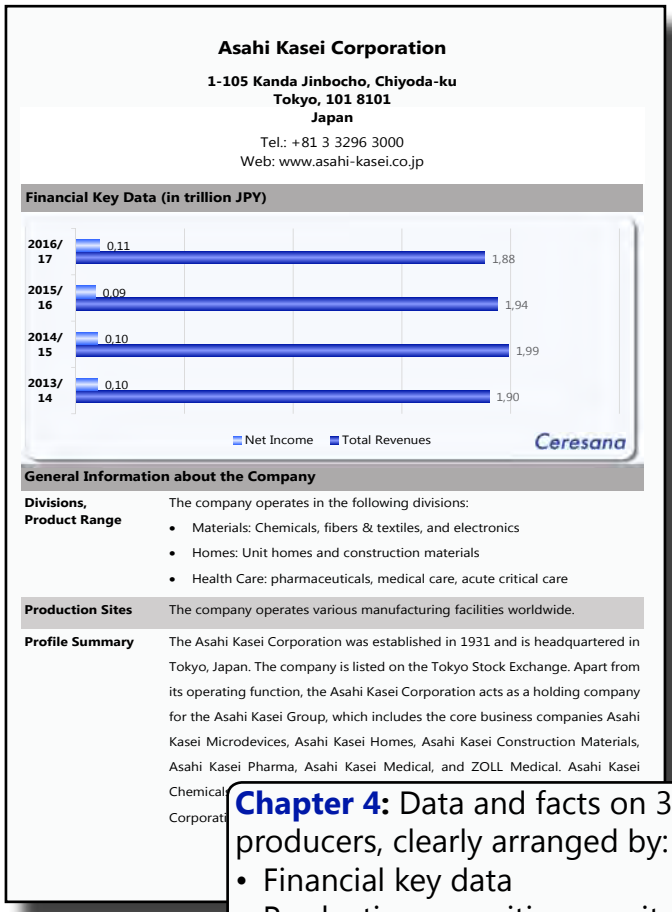

Asahi Kasei Corporation

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Tokyo, 101 8101
Japan

Tel.: +81 3 3296 3000
Web: www.asahi-kasei.co.jp

Financial Key Data (in trillion JPY)

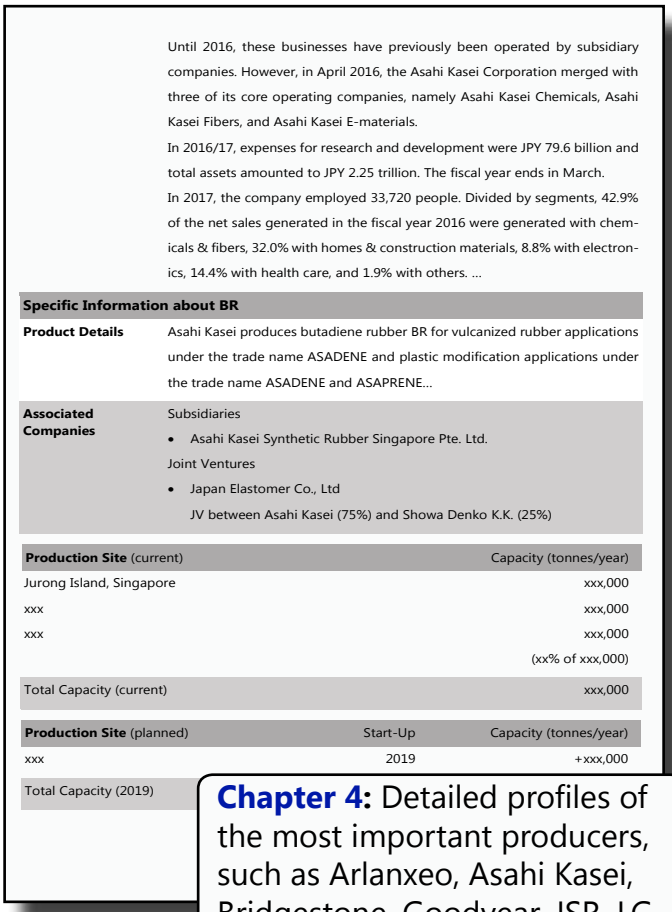
General Information about the Company

Divisions, Product Range — The company operates in the following divisions:
- Materials: Chemicals, fibers & textiles, and electronics
- Homes: Unit homes and construction materials
- Health Care: pharmaceuticals, medical care, acute critical care

Production Sites — The company operates various manufacturing facilities worldwide.

Profile Summary — The Asahi Kasei Corporation was established in 1931 and is headquartered in Tokyo, Japan. The company is listed on the Tokyo Stock Exchange. Apart from its operating function, the Asahi Kasei Corporation acts as a holding company for the Asahi Kasei Group, which includes the core business companies Asahi Kasei Microdevices, Asahi Kasei Homes, Asahi Kasei Construction Materials, Asahi Kasei Pharma, Asahi Kasei Medical, and ZOLL Medical. Asahi Kasei Chemical
Corporati

Chapter 4: Data and facts on 33 producers, clearly arranged by:
- Financial key data
- Production capacities per site
- Profile summary



Until 2016, these businesses have previously been operated by subsidiary companies. However, in April 2016, the Asahi Kasei Corporation merged with three of its core operating companies, namely Asahi Kasei Chemicals, Asahi Kasei Fibers, and Asahi Kasei E-materials.
In 2016/17, expenses for research and development were JPY 79.6 billion and total assets amounted to JPY 2.25 trillion. The fiscal year ends in March.
In 2017, the company employed 33,720 people. Divided by segments, 42.9% of the net sales generated in the fiscal year 2016 were generated with chemicals & fibers, 32.0% with homes & construction materials, 8.8% with electronics, 14.4% with health care, and 1.9% with others. ...

Specific Information about BR

Product Details — Asahi Kasei produces butadiene rubber BR for vulcanized rubber applications under the trade name ASADENE and plastic modification applications under the trade name ASADENE and ASAPRENE...

Associated Companies — Subsidiaries
- Asahi Kasei Synthetic Rubber Singapore Pte. Ltd.

Joint Ventures
- Japan Elastomer Co., Ltd
  JV between Asahi Kasei (75%) and Showa Denko K.K. (25%)

Production Site (current)	Capacity (tonnes/year)
Jurong Island, Singapore	xxx,000
xxx	xxx,000
xxx	xxx,000
	(xx% of xxx,000)
Total Capacity (current)	xxx,000

Production Site (planned)	Start-Up	Capacity (tonnes/year)
xxx	2019	+xxx,000
Total Capacity (2019)		

Chapter 4: Detailed profiles of the most important producers, such as Arlanxeo, Asahi Kasei, Bridgestone, Goodyear, JSR, LG Chem, PetroChina, and Sinopec.

This study is useful for:

- Producers, traders, and converters of elastomers such as butadiene rubber (BR), styrene-butadiene rubber (SBR), acrylonitrile butadiene rubber (NBR),ethylene propylene diene monomer (EPDM) rubber, etc.
- 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.
- Associations and institutes, investors and consultations
- Executive board, technology and production, strategic planning, corporate development, R&D, market research, marketing, sales and distribution, procurement

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Oliver Kutsch, CEO

We look forward to hearing from you!

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- Polylactic Acid (PLA) - World
- Starch Based Plastics - World

Chemicals

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- Carbon Black - World
- Chelating Agents - World
- Fillers - Europe
- Fillers - World
- Flame Retardants - World
- Pigments - World
- Plastic Additives - World
- Plasticizers - World
- Solvents - World
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- Surfactants - World
- Titanium Dioxide (TiO2) - World

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- Plastic Pipes - Europe
- Plastic Pipes - World
- Plastic Windows - World
- Printing Inks - Europe
- Printing Inks - World
- Windows & Doors - Europe

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- Composites (CFRP & GFRP) - World
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- Expandable Polystyrene (EPS) - World
- Masterbatches - World
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- Polyethylene (HDPE) - World
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- Synthetic Rubber - World
- Thermoplastic Elastomers (TPE) - World

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- Bags, Sacks & Pouches - Europe
- Bags, Sacks & Pouches - World
- Corrugated Board & Solid Board - Europe
- Flexible Packaging - Europe
- Food Packaging - Europe
- Labels - Europe
- Plastic Caps & Closures - Europe
- Plastic Caps & Closures - World
- Plastic Containers - Europe
- Plastic Films - Europe
- Plastic Films - World
- Plastic Packaging for Cosmetics - Europe
- Rigid Metal Packaging - Europe
- Rigid Plastic Packaging - World

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