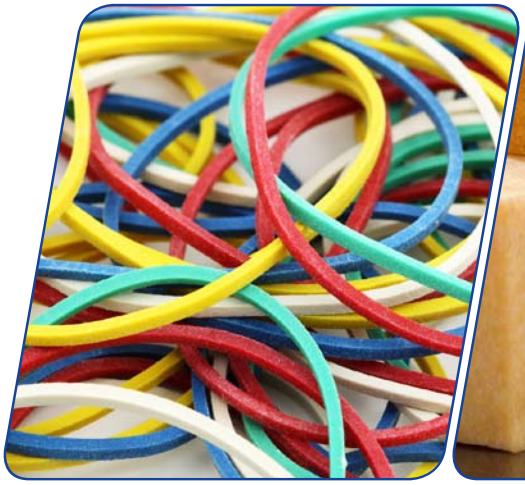
Market Study: Synthetic Rubber (4th edition)





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This brochure provides further information on the study "Synthetic Rubber - World (4th edition)"

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ARLANXEO Holding B.V.

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The Netherlands

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Web: www.arlanxeo.com

General Information about the Company	
Divisions, Product Range	The product portfolio includes: • High performance elastomers • Tire and specialty rubbers
Production Sites	The company´s production sites are located in: • Nantong, China • ...
Profile Summary	ARLANXEO is a global synthetic elastomer company with its headquarters in The Hague, the Netherlands. Since December 2018, the company is a wholly-owned subsidiary of Saudi Aramco, a producer of energy and chemicals, based in Dhahran, Saudi Arabia. ARLANXEO develops, produces and markets elastomers that are used for a wide range of applications in the automotive...
Specific Information about Elastomers	
Product Details	Within the business unit High Performance Elastomers, ARLANXEO offers a wide range of products, including ethylene propylene rubber (EPMs and EPDMs), polychloroprene rubber (CR), ethylene vinylacetat rubber (EVM), hydrated nitrile rubber (HNBR), and acrylnitrile butadiene rubber (NBR)...
Associated Companies	Subsidiaries: • ARLANXEO Brasil S.A. • ..

Production Site – SBR (current)	Capacity (tonnes/year)
Duque de Caxias, Brazil (E-SBR)	xx,000
...	...
Total Capacity (current)	xx.000

Production Site – BR (current)		Capacity (tonnes/year)
xxx, xxx		xx,000
...		...
Total Capacity (current)		xx.000
Production Site – EPDM (current)		Capacity (tonnes/year)
xxx, xxx		xx,000
...		...
Total Capacity (current)		xx.000
Production Site – EPDM (planned)	Start-Up	Capacity (tonnes/year)
xxx, xxx	2021	xx,000
Total Capacity (2021)		xx.000
Production Site – IIR (current)		Capacity (tonnes/year)
xxx, xxx		xx,000
...		...
Total Capacity (current)		xx.000
Production Site – NBR (current)		Capacity (tonnes/year)
xxx, xxx		xx,000
...		...
Total Capacity (current)		xx.000
Production Site – HNBR (current)		Capacity (tonnes/year)
xxx, xxx		xx,000
...		...
Total Capacity (current)		xx.000
Production Site – CR (current)		Capacity (tonnes/year)
xxx, xxx		xx,000
Total Capacity (current)		xx,000

*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

Market Study: "Synthetic Rubber - World (4th edition)"
25 Countries, 66 Producers, 320 Pages, 98 Graphs, 157 Tables, 01/2022

Summary

Chapter 1 provides a depiction and analysis of the world market for synthetic elastomers - including forecasts up to 2030: the development of revenues, demand and production is detailed for each world region. In addition, the various areas of application for synthetic rubber are analyzed: Data and factors influencing use in:

- Tires
- Vehicles
- Industrial and construction products
- Modification of materials
- Other uses

The demand is also considered in detail - split up into the types:

- Styrene-butadiene rubber (E-SBR)
- Styrene-butadiene rubber (S-SBR)
- Butadiene rubber (BR)
- Ethylene-propylene-diene rubber (EPDM)
- Butyl rubber (IIR)
- Acrylonitrile-butadiene rubber (NBR)
- Chlorobutadiene (CR) & polyisoprene (IR)

Chapter 2 provides a analysis of 25 countries:

- Demand,
- Export & Import
- Production
- Revenues

In addition, the different applications are considered. The market data of demand per country is broken down for the individual elastomer types.

Chapter 3 provides a useful manufacturer directory with the 66 most important elastomer producers, clearly structured by contact details, revenue, profit, product range, production facilities, brief profile and capacity details. The most important manufacturers include: ARLANXEO Holding B.V., Bridgestone Corporation, ExxonMobil Chemical Company, Goodyear Tire & Rubber Company, JSR Corporation, Korea Kumho Petrochemical Co., Ltd. (KKPC), Lanxess AG, Nizhnekamskneftekhim JSC (NKNK), PetroChina Company Limited (CNPC), Synthos S.A., and Versalis S.p.A.

2.5.4 Japan

2.5.4.1 Demand and Revenues

The demand for elastomers in Japan in 2020 amounted to around X tonnes. We forecast an average growth rate of X% p.a. for the period from 2020 to 2030. In 2030, the Japanese demand volume will amount to approx. X tonnes.
Revenues generated with elastomers amounted to around USD X billion in 2020. In 2030, we expect a value of approx. USD X billion. This represents a below-average growth rate of X% per year compared to the region as a whole in 2020.

Revenues	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
million USD	X	X	X	X	X	X	X	X	X	X% p.a.
million EUR	X	X	X	X	X	X	X	X	X	X% p.a.

Table: Revenues generated with elastomers in Japan from 2018 to 2030, in million USD and million EUR

in 1.000 tonnes	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
Tires	X	X	X	X	X	X	X	X	X	X% p.a.
Automotive	X	X	X	X	X	X	X	X	X	X% p.a.
Industry / Constrution	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.
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 elastomers in Japan from 2018 to 2030 – split by applications

With about X tonnes, the tire sector represented the largest application area for elastomers in 2020. The tire sub-market is expected to record the highest percentage growth in coming years.
The economic trend was already pointing downward before 2020, but the 4.8% decline in GDP in the pandemic year was more pronounced than in previous years. The years 2021 and 2022 are expected to see noticeable recovery effects before economic growth slows down again. Not all areas were hit equally hard by the crisis. This has allowed the IT and pharmaceutical industries to somewhat compensate for the service industry. The digitalization agenda and the goal of creating a climate-neutral Japan are giving industry new incentives to initiate modernization projects. With its economic stimulus programs, the government has ensured a stable unemployment rate, but this has still not prevented a weakening of private consumption. The sector is expected to recover slowly, but a return to pre-crisis levels will not be achieved in 2021.

in 1.000 tonnes	2018	2019	2020	2021p	2022p	2023p	2024p	2025p	2030p	2020-2030
S-SBR	X	X	X	X	X	X	X	X	X	X% p.a.
E-SBR	X	X	X	X	X	X	X	X	X	X% p.a.
BR	X	X	X	X	X	X	X	X	X	X% p.a.
EPDM	X	X	X	X	X	X	X	X	X	X% p.a.
IIR	X	X	X	X	X	X	X	X	X	X% p.a.
NBR	X	X	X	X	X	X	X	X	X	X% p.a.
IR & CR	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 elastomers in Japan from 2018 to 2030 – split by products

The construction industry has experienced a decline in recent years, although this cannot be compared with the consequences of the 2020 crisis. After a decline in the number of construction sites starting construction by a double-digit percentage, the figures have been pointing up since the beginning of 2021. This development applies to both residential and commercial construction. For the first time, these two areas are providing positive forecasts for building construction, as a major wave of modernization is expected to sweep across Japan's building mass to make all buildings more earthquake-resistant. Similarly, there is hope that the restructuring of the industry will generate new economic construction projects. However, the commercial and office construction subsectors are suffering from weakening demand. Only a minor boost can come from hotel construction...

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