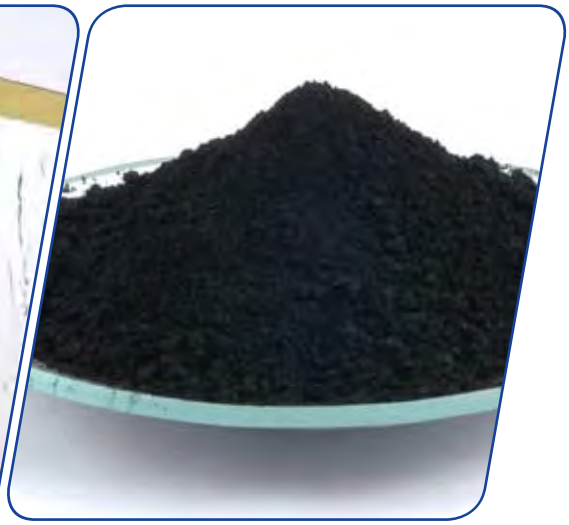
Market Study: Carbon Black

2nd edition



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Nowadays, information is available at the push of a button, always, and in overwhelming amounts. But what is the best way to find the crucial data amongst all that information? That is why several thousand companies use the knowledge of our employees. Based on their extensive experience, they provide decisive data for the benefit of their customers. The clearly arranged and practice-oriented studies of Ceresana offer precise analyses and well-founded forecasts - also for your markets!

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Our time-tested understanding of the markets helps you to even better assess potential chances, new products and technologies, but also your competitors. Use this knowledge to shape an ever more effective and efficient future for your company.
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We are your market experts

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Yours faithfully, Oliver Kutsch

Our studies - Your benefits

- **Gain new customers**
  Our studies show who are potential new customers and where you can find them
- **Locate new procurement markets**
  Recognize better or alternative sources of supply
- **Improve your understanding of your competitors**
  Who exactly are your competitors - and what are their strengths and weaknesses
- **Obtain a more detailed picture of your segment**
  Learn which time is the best for entering or leaving a market
- **Have a look at the future**
  Find out if new investments and technologies are worthwhile and how to gain access to future markets. We also show possible market scenarios
- **Recognize opportunities and risks**
  Identify opportunities and risks on your target markets in time

This study is particularly 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
- Executive board, strategic planning, business development, R&D, technology, market research, marketing, sales and distribution, and procurement

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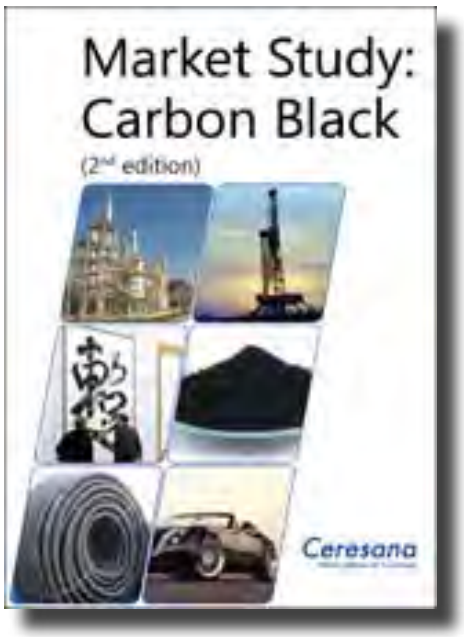


Carbon Black is used above all for manufacturing all kinds of tires. In these, as well as in a variety of other rubber goods, Carbon Black serves mainly as a filler. In other areas, for example plastics, paints, coatings and printing inks, Carbon Black is utilized as a pigment. The market research institute Ceresana forecasts a dynamic growth of global demand for Carbon Black: Its market volume will increase to more than 15 million tonnes by 2022.

Dynamic Development: Application as Pigment

The most important application for Carbon Black are tires made of elastomers, such as SBR (styrene butadiene rubber), BR (butadiene rubber) and natural rubber. In 2014, this application represented about 70% of total consumption worldwide. The production of rubber goods for the segment 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 conveyer belts, roll coverings, tubes, profiles, seals, cables, moldings, and roofing foils. The highest Carbon Black demand was recorded for the elastomer types SBR, BR, NBR, and EPDM. The proportion of Carbon Black used as a black pigment in printing inks, plastics as well as paints and coatings represented less than 10% of the total market volume in 2014. However, these application areas are experiencing the strongest growth rates of 2.9% to 4.5% p.a.

Dominating Sales Market: Asia-Pacific

In 2014, more than 60% of Carbon Black were processed in the Asia-Pacific region. North America ranked second at a considerable distance, followed by Eastern Europe. As capacities will be increased by almost 2 million tonnes, above all by expanding plants in China and India, export surplus in Asia will augment further despite rising local requirements.

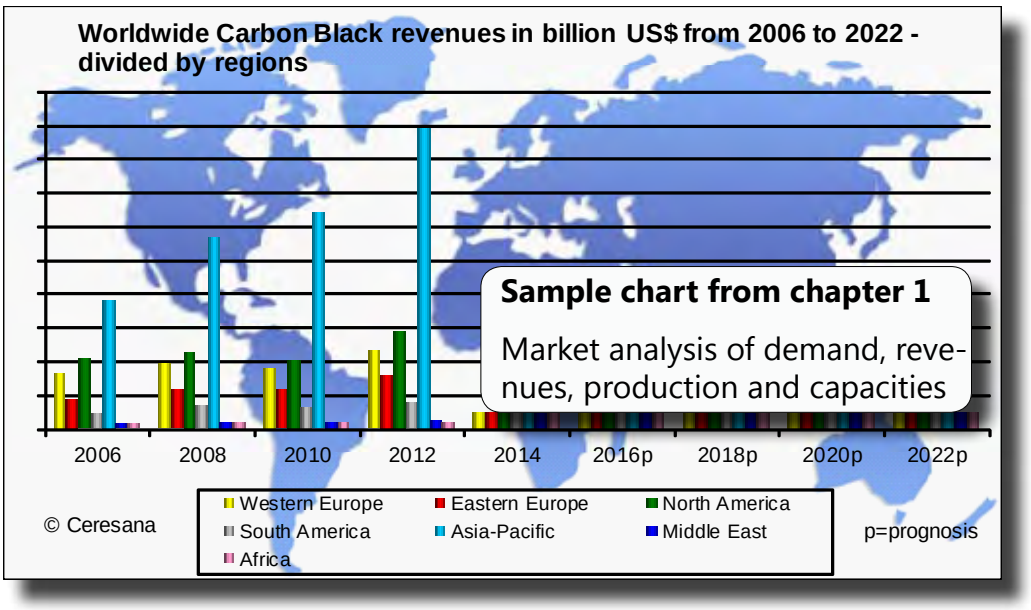
The Study in Brief

Chapter 1 provides a presentation and analysis of the global market for Carbon Black including forecasts up to 2022. Development of revenues, demand, production, and capacities are analyzed for each individual region.

Chapter 2 offers a detailed analysis of the Carbon Black market in the 22 major countries. Data on demand, revenues, production, and producers of Carbon Black as well as import and export is provided. Demand will be analyzed in detail for the segments Tires, Rubber - Automotive, Rubber - Industry and Construction, Rubber - Others, Plastics, Printing Inks, as well as Paints and Coatings.

Chapter 3 gives an in-depth analysis of sales markets for Carbon Black as well as of influences of various application areas. Data on demand development is discussed in the regions Western Europe, Eastern Europe, North America, South America, Asia-Pacific, and the Middle East / Africa.

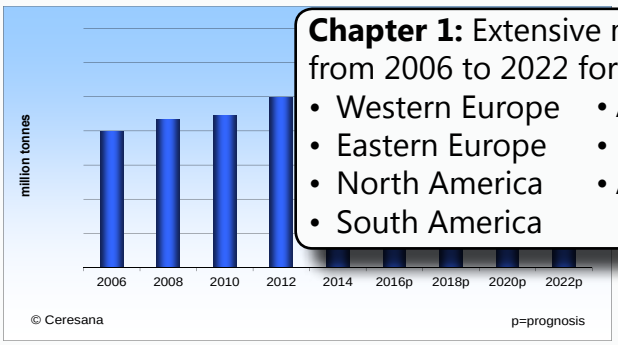
Chapter 4 provides profiles of the largest manufacturers of Carbon Black, clearly arranged according to contact details, turnover, profit, product range, production sites, capacities, and profile summary. More detailed profiles are given for 59 manufacturers including Aditya Birla Group, Bridgestone Group, Cabot Corporation, China Synthetic Rubber Corporation, Hebei Daguangming Industry Group Company Limited, Jiangxi Black Cat Carbon Black Co., Ltd., OCI Company Ltd., Omsk Carbon Group OOO, Orion Engineered Carbons GmbH, Phillips Carbon Black Limited, Sid Richardson Carbon Co., Tatneft JSC, and Tokai Carbon Co., Ltd.



1.3 Eastern Europe

1.3.1 Demand and Revenues

Demand for Carbon Black in Eastern Europe rose by, on average, X% p.a. during the past eight years and amounted to X million tonnes in 2014. Until 2022, we expect demand for Carbon Black to further increase to around X million tonnes. Carbon Black demand in Eastern Europe will account for X% of global consumption in 2022. Revenues amounted to approx. €X billion in 2014. We forecast Carbon Black to have a market value of €X billion in 2022.



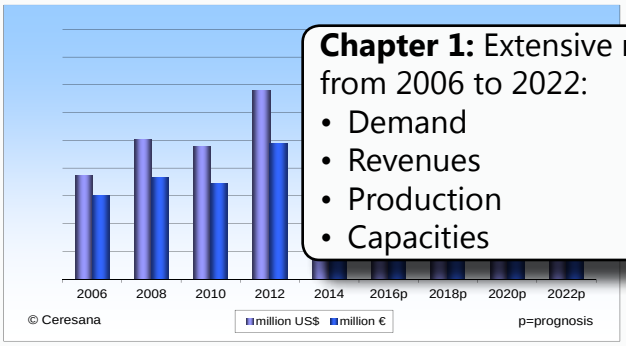
Chapter 1: Extensive market data from 2006 to 2022 for the regions:
- Western Europe
- Eastern Europe
- North America
- South America
- Asia-Pacific
- Middle East
- Africa

Graph: Carbon Black demand in Eastern Europe from 2006 to 2022

In 2014, Russia was the largest Carbon Black consumer in Eastern Europe. Turkey ranked second, followed by Poland. The remaining East European countries (Romania, Greece, Belarus, Slovakia, Bulgaria, Croatia, Slovenia, Serbia, and Lithuania) reached an aggregated market share of roughly X% in 2014. We forecast Russia to increase its market share to X% by 2022.

In 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Poland	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Russia	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Czechia	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Turkey	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Ukraine	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Hungary	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Others	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX% p.a.**

Table: Carbon Black demand in Eastern Europe from 2006 to 2022 – split by major countries



Chapter 1: Extensive market data from 2006 to 2022:
- Demand
- Revenues
- Production
- Capacities

Graph: Carbon Black revenues in Eastern Europe from 2006 to 2022, in million US$ and million €

2.5.2 Country Profile - India

2.5.2.1 Demand and Revenues

In 2014, India processed about X tonnes of Carbon Black. Compared to 2006, this corresponds to an average increase of X% per year. We forecast Indian Carbon Black consumption to increase by, on average, X% p.a. to approx. X tonnes in 2022. Revenues generated from Carbon Black in India amounted to approx. US$X billion in 2014. We forecast a market value of US$X billion in 2022.

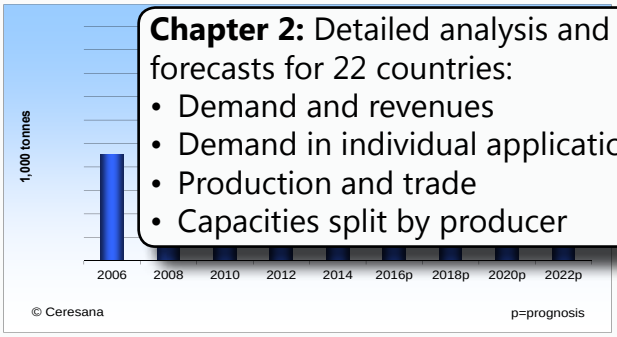
The most important application area for Carbon Black was Tires in 2014. Rubber – Others ranked second, closely followed by Rubber - Industry and Construction. For the upcoming eight years, we forecast highly dynamic growth rates for the segment Printing Inks in particular. They are likely to amount to an average of X% p.a. The largest application area Tires will experience a lower growth rate of, on average, X% p.a.

In 1,000 tonnes	2006	2008	2010	2012	2014	2016p	2018p	2020p	2022p	2014-2022
Tires	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Rubber - Automotive	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Rubber - Industry and Construction	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Rubber - Others	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Rubber - Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX% p.a.**
Plastics	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Printing Inks	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Paints and Coatings	XX	XX	XX	XX	XX	XX	XX	XX	XX	XX% p.a.
Total	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX**	**XX% p.a.**

Table: Carbon Black demand in India from 2006 to 2022 – split by application

2.5.2.2 Production, Capacities and Trade

The production volume of Carbon Black was incremented to X tonnes in 2014. We forecast output to increase by X% p.a. in the upcoming eight years. Accordingly, production volume will amount to X tonnes in 2022. India's total capacity currently accounts for approx. X million tonnes. Between 2014 and 2022, new production sites will be opened with an additional annual capacity of X tonnes.



Graph: Carbon Black production in India from 2006 to 2022

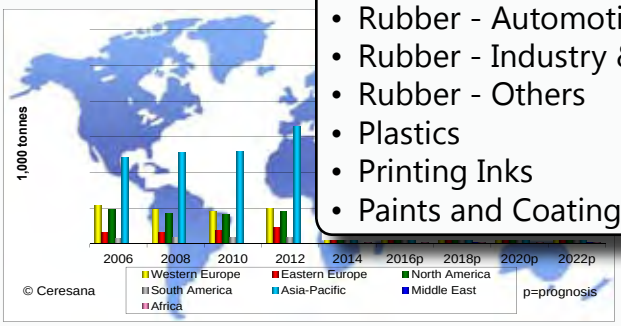
Company	In tonnes
XXX	XXX
XXX	XXX
XXX	XXX
XXX	XXX
XXX	XXX
Total	**XXX**

Table: Carbon Black capacities in India in 2014 – split by producer

Chapter 2: Detailed analysis and forecasts for 22 countries:
- Demand and revenues
- Demand in individual applications
- Production and trade
- Capacities split by producer

3.2.1 Rubber - Automotive

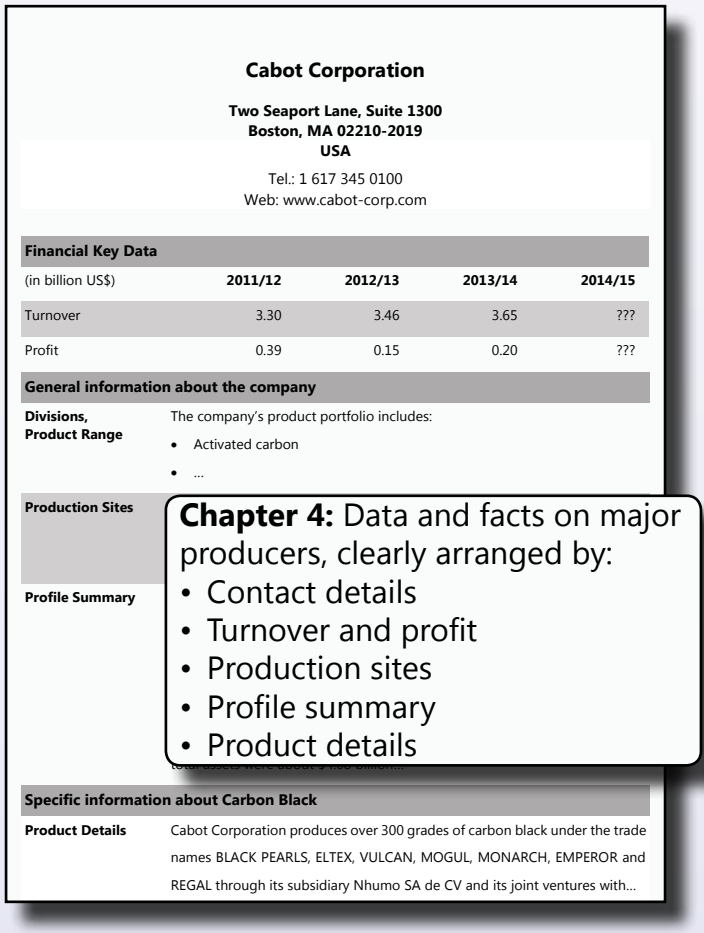
In 2014, approx. X tonnes of Carbon Black were used worldwide in the automotive industry to manufacture rubber goods. Overall global Carbon Black demand in the segment Rubber – Automotive will increase at average rates of X% p.a. to a volume of approx. X million tonnes in 2022. Elastomers are not only used in tire manufacturing as covered in chapter 3.1.1, but also in producing a wide range of other rubber goods in the automotive industry. These include, for example, tubes, cables and seals. Carbon Black is used above all in products made of butyl and EPDM rubber. Butyl rubber or isobutylene-isoprene rubber (IIR) is a copoly
in tubes. Ethylene propylene diene monome
to different weather conditions, heat, UV r
produced for windows, headlights, tubes, a



Graph: Worldwide Carbon Black demand in Rubber - Automotive from 2006 to 2022 – split by region

In 2014, major consumer of Carbon Black in Rubber- Automotive was the Asia-Pacific region with a volume of X tonnes. Western Europe ranked second, followed by North America.

Chapter 3: Detailed data and influential factors for the use in:
- Tires
- Rubber - Automotive
- Rubber - Industry & Construction
- Rubber - Others
- Plastics
- Printing Inks
- Paints and Coatings



Cabot Corporation

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USA

Tel.: 1 617 345 0100
Web: www.cabot-corp.com

Financial Key Data				
(in billion US$)	**2011/12**	**2012/13**	**2013/14**	**2014/15**
Turnover	3.30	3.46	3.65	???
Profit	0.39	0.15	0.20	???

General information about the company

Divisions, Product Range
The company's product portfolio includes:
- Activated carbon
- ...

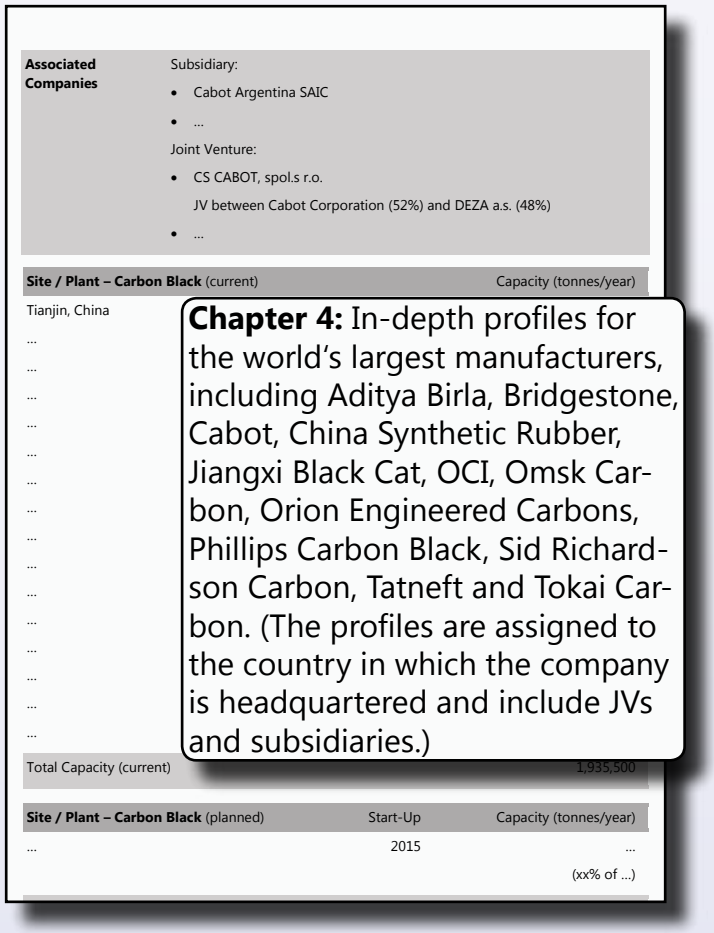
Production Sites

Profile Summary

Chapter 4: Data and facts on major producers, clearly arranged by:
- Contact details
- Turnover and profit
- Production sites
- Profile summary
- Product details

Specific information about Carbon Black

Product Details
Cabot Corporation produces over 300 grades of carbon black under the trade names BLACK PEARLS, ELTEX, VULCAN, MOGUL, MONARCH, EMPEROR and REGAL through its subsidiary Nhumo SA de CV and its joint ventures with...



Associated Companies
Subsidiary:
- Cabot Argentina SAIC
- ...

Joint Venture:
- CS CABOT, spol.s r.o.
  JV between Cabot Corporation (52%) and DEZA a.s. (48%)
- ...

Site / Plant – Carbon Black (current)	Capacity (tonnes/year)
Tianjin, China	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
...	...
Total Capacity (current)	1,935,500

Site / Plant – Carbon Black (planned)	Start-Up	Capacity (tonnes/year)
...	2015	...
		(xx% of ...)

Chapter 4: In-depth profiles for the world's largest manufacturers, including Aditya Birla, Bridgestone, Cabot, China Synthetic Rubber, Jiangxi Black Cat, OCI, Omsk Carbon, Orion Engineered Carbons, Phillips Carbon Black, Sid Richardson Carbon, Tatneft and Tokai Carbon. (The profiles are assigned to the country in which the company is headquartered and include JVs and subsidiaries.)

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- ☐ Styrene
- ☐ Surfactants (2nd ed.)
- ☐ Titanium Dioxide
- ☐ Toluene
- ☐ Xylene

Packaging

- ☐ Bags and Sacks - Europe
- ☐ Bags and Sacks - World
- ☐ Caps & Closures - Europe
- ☐ Corrugated & Solid Board & Carton
- ☐ Flexible Packaging - Europe
- ☐ Food Packaging - Europe
- ☐ Plastic Bottles - Europe
- ☐ Plastic Caps & Closures - Europe
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- ☐ Urea - World

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- ☐ Ethylene - USA
- ☐ Propylene - China
- ☐ Propylene - USA

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