

# Global Rubber Chemicals Market Outlook to 2027

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## Abstracts

According to BlueQuark Research & Consulting, the global market for rubber processing chemicals is expected to grow at a moderate growth rate during the forecast period. Factors such as increasing demand from the tire manufacturing industry, growing demand non-tire segment in the construction industry and shift towards radialization in vehicle tires. The harmful effect of the rubber processing chemicals, the European Union's stringent environmental laws, and the increasing demand for electronic vehicles over IC engine vehicles are likely to hinder the market's growth. However, the ongoing R&D to improve the performance of the rubber chemicals to make them more compliant with the ever-changing regulations is likely to act as an opportunity in the coming years.

In 2019, the global tire production stood at around 2,240 million units in terms of volume and is anticipated to grow at a moderate rate during the forecast period despite the ongoing COVID-19 pandemic. Global tire demand is driven by vehicles in use generating lasting tire wear and replacement needs and new vehicle sales requiring OEM tires to be fitted. In a regular car tire, around 14% of a tire is made up of natural rubber, 24% is made up of synthetic polymers, and the remaining is blended with rubber chemicals from which rubber antioxidants make around 14% of the total composition. China exported tires worth USD 14.8 billion in 2019, 18.8% of the total exported rubber tires. Around 40% of tires for the passenger car were exported to the United States and the European Union. According to China Rubber Industry Association (CRIA), China's truck and bus tire production in FY 2019 was 41.64 million units, a fall of 4.6% compared to that of 2018; this was mainly due to the dip in demand for vehicles globally. India is one of the major markets in the Asia Pacific region, where passenger vehicle sales improved after Q3 2020. Having sales reached around 3,10,294 units in October 2020 compared to 2,71,737 units in the same month last year has registered 14.19%.

According to, UN Department of Economic and Social Affairs, 55% of the world's total population currently living in urban areas, and this portion are expected to increase to 68% by 2050. The steady shift of the human population from rural to urban areas and the overall growth of the world's population are likely to add a further 2.5 billion people to urban areas by 2050, with around 90% of this increase taking place in Asia and Africa. The increase in urban population is likely to increase demand for vehicles globally and, in turn, likely to increase demand for tires globally. According to Japan Automobile Tyre Manufacturers Association (JATMA), the sales of new automotive tires in 2020 was 36,439,000, which was a 17% decrease from the previous year. The first two quarters of 2020 were affected due to the COVID-19 pandemic; however, the demand for new vehicle tires began to recover in the second half of 2020 due to the strong demand for vehicles. In March 2021, Apollo Tires introduced a new range of tires, Apterra Cross tires, for the compact SUV segment in India. These tires are an outcome of the company's research and the exact usage patterns of the Compact SUV. In the same 0period, Nokian Tyres Plc announced to increase its production capacity for passenger vehicle tires by 30%. The global market for tires is likely to remain significant due to the increase in demand for passenger vehicles, the increasing global population, and the increasing wear and tear in conventional vehicle tires. The increasing demand for tires globally is likely to increase the demand for rubber chemicals

In 2019, the global tire production stood at around USD 155 million in terms of revenue and is likely to grow moderately during the forecast period despite the ongoing COVID-19 pandemic, owing to the increased globalization across and the increasing economic investments for the improvement of infrastructure across the globe. In 2019, global rubber production stood around 28.8 million tonnes and out of which approximately 70% of rubber is used by the tire industry, which is 20.16 million tonnes. In a passenger vehicle tire, around 19% of a tire is made up of natural rubber, 24% is made up of synthetic polymers, and the remaining is blended with rubber chemicals from which rubber antioxidants, antiozonants and curing system make around 14% of the total composition, whereas in a truck tire the natural rubber content is 34% and antioxidants, antiozonants and curing system makes around 10%. Bridgestone Corporation was the largest tire manufacturer in 2020 based on its tire-related revenue and generated around USD 24,217 million. Tire covers 84% of the business segment of the company. China is one of the largest markets of tires and as a key manufacturer, it meets one-third of the global demand. In 2019, approximately 845 million units of tires were manufactured which were 5% less than manufactured in 2018. The main reasons for this decline was the slowdown of the automotive market and the tariff barriers and anti-dumping duties applied by many countries due to the export prices which were less

than the prices domestically.

Asia-Pacific is the world's largest tire manufacturer with three major manufacturing countries including China, India and Japan. In 2020, these three countries contributed to 70% of Asia-Pacific's tire manufacturing industry with 1.3 billion tires at the rate of USD97.4 billion. It is estimated that the Asia-Pacific tire market is expected to grow on average by 3.6% through 2025 to reach the USD117.6 billion market. China's GDP in 2020 was USD15.66 trillion, an increased rate of 2.3% compared to 2019 even with pandemic conditions in the whole world and it is expected that there will be a growth of 5.7% per year until 2025. While 7.5% of GDP is contributed from the rubber industry of China. China has a 70% share in total rubber processing chemicals produced throughout the world and out of which the country consumes only 33-35% and the rest all are exported to different countries. Most of the countries in the world are dependent on China for rubber processing chemicals as the country hold huge raw material source. Due to pandemic, even though the country has 40% of the world market in rubber production, consumption fell by 20.1% in the H1 of 2020 and later on in the 2nd half of 2020 the market grew by 0.8%, year-on-year basis and consumed 1.38 million tonne which matches the 1.39 million tonne consumption in the same period of the previous year. From June 2020, the market for rubber started surging due to an increase in the country's auto sales by 14.5%. According to the China Association of Automobile Manufacturers (CAAM), the country's vehicle market started recovering and in the first quarter of 2021, the automobile auto sales at 6.34m units, up 73% YoY, driven by both passenger vehicles (+74% YoY) and commercial vehicles (+71% YoY). This has translated to a healthy demand for rubber accelerators and is further reflected in the sustained high price for the feedstock. Even the New Energy Vehicles segment sales reached up to 226,000 units and thereby increasing the market for tire materials.

In 2019, LANXESS has developed a universally suitable rubber accelerator for tires and technical rubber goods. The product is currently under trial and named Vulcacit TZ, which is a sulfenamide and based on aromatic amines.

In March 2019, an explosion in the rubber chemical production plant in Xiangshui led to a wave of panic purchases that appeared in the market, which increased the price of antioxidants that rose around 2,000 RMB/ ton, however in other periods, the demand and price remained stable.

Elastomer producer Versalis , Eni's chemical company, and Bridgestone EMIA, have signed a joint development agreement for the research, production and supply of synthetic rubber with advanced properties. The Research and Development divisions of

the two organizations will collaborate, using an Open Innovation model, to develop technologies and new elastomer grades, including Styrene-Butadiene Rubber (SBR), for the production of high-performance tyres.

Major players in the global market include CHINA SUNSINE CHEMICAL HOLDINGS LTD, LANXESS, NOCIL LIMITED, EASTMAN, KEMAI CHEMICAL CO., LTD. Other significant players in the market include Shandong Yanggu Huatai Chemical Co., Ltd., Arkema, Sinochem, WillingChem etc.

Our Global Rubber processing Chemical market research report provides deep insight into the current and future state of the rubber processing chemicals market across various regions. Also, the study comprehensively analyzes the rubber chemicals market by segments based on type (Accelerators and Anti-oxidants), by Application (Tyre and Non-Tyre), and by End-user (Automotive Industry, Consumer Goods, Footwear, Industrial, and Others) and, by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trend, market developments, market opportunities, rubber processing chemicals market size, rubber chemicals sales, market analysis, market revenue, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies, including their market share and projects.

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ema Group

ochem

F SE

IN MEYER

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C Group, Inc.  
khraj Group  
T. Vanderbilt Holding Company, Inc  
utia Inc.  
mitomo Chemical Co.  
sho Industries Pvt. Ltd.  
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