

PPE: Market Dynamics – Butadiene & Derivatives 2017

Market Dynamics Butadiene & Derivatives - 2017 is one in a series of market focused reports published annually as part of the Petroleum and Petrochemical Economics (PPE) program.

This Market Dynamics report provides an in-depth analysis of the butadiene value chain including:

- **Butadiene**
- **Butadiene Rubber (BR)**
- **Styrene Butadiene Rubber (SBR)**
- **Acrylonitrile Butadiene Styrene (ABS)**

Published: May 2017

Abstract:

Butadiene demand was robust during 2016, with the major Asian and Western markets following historic growth trends, and only Eastern Europe and South America remaining problematic.

U.S. anti-dumping duties on Chinese passenger car/light truck tyre imports remain a major influence on the global industry since their imposition in 2015. While Chinese tyre production dropped sharply in 2015 as a result, it recovered equally well in 2016. Fears that the U.S. anti-dumping duties would be extended to cover heavy truck and bus tyres were allayed, with a finding in early 2017 that no harm had been caused to U.S. suppliers as a result of the imports. The duties on passenger car and light truck (PCLT) tyres have however had wide ranging effects, creating winners and losers in all regions. Some countries with spare capacity to produce low priced PCLT tyres have benefited, replacing China's position in the U.S. market. Other countries have lost tyre production however, as Chinese exports which had previously targeted the U.S. found new markets in developing regions.

The global market for crude C4 is expected to tighten in the coming years as the butadiene market continues to grow, and the rate of crude C4 supply growth from steam crackers declines. The low energy prices in recent years have slowed the progression of the shale industry in North America, but cost reduction and efficiency improvements have allowed a recovery in gas supply growth, and the volumes of excess NLGs for export from the United States will be a defining factor in olefins markets globally in the coming years.

Global Butadiene Demand, 2016-e
Million tons

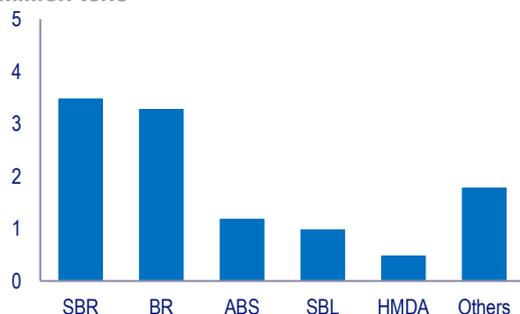


Table of Contents:

1. Executive Summary
2. The Butadiene Industry
 - 2.1. Global Overview
 - 2.2. Current Industry Performance
3. Butadiene
4. Butadiene Rubber (BR)
5. Styrene Butadiene Rubber (SBR)
6. Acrylonitrile Butadiene Styrene (ABS)
7. Other Butadiene Derivatives
- Appendix
 - A. Methodology
 - B. The Butadiene & Derivatives Industry – Technology

Chapters 3 to 6 are segmented by key geographic region:

- North America
- South America
- Western Europe
- Central and Eastern Europe
- Middle East and Africa
- Asia Pacific

Each region/country is further segmented by:

- Consumption: Assesses historic and forecast consumption; forecasts are based on projections of end use and economic activity.
- Supply: Includes a list of all producers, their production capacity, location, etc, and discussion of the status of new projects.
- Supply, Demand and Trade: Provides historical analysis and forecasts to 2035 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilization.

This analysis will identify the issues shaping the industry, as well as provide an independent appraisal of the market.

NexantThinking™ Online Database includes supply, demand and trade analysis for 41 countries, with forecasts to 2035.

Subscription Details:

Subscription to **Butadiene & Derivatives - 2017** includes:

- One hard copy report
- 12 month access via the NexantThinking website, to:
 - Unlimited downloads of soft copy reports
 - Downloadable data in Excel from the Online Database
- Webinar
- Consultation time with the project team

Customized subscriptions are available.

NexantThinking™

NexantThinking reports and subscription programs provide clients with comprehensive analytics, forecasts and insights for the chemicals, polymers, energy and cleantech industries. Using a combination of business and technical expertise, with deep and broad understanding of markets, technologies and economics, NexantThinking provides solutions that our clients have relied upon for over 50 years.

Global in scope, Nexant serves its clients from over 30 offices located throughout the Americas, Europe, the Middle East, Africa and Asia.

Subscribe to our thought leadership today and explore our products and services at:

thinking.nexant.com

Corporate Headquarters

Tel: +1 415 369 1000
101 2nd St Suite 1000
San Francisco
CA 94105-3651
USA

Americas

Tel: +1 914 609 0300
44 S Broadway,
4th Floor White Plains
NY 10601-4425
USA

Europe, Middle East & Africa

Tel: +44 20 7950 1600
1 King's Arms Yard
London EC2R 7AF
United Kingdom

Asia Pacific

Tel: +662 793 4600
22nd Floor, Rasa Tower I
555 Phahonyothin Road
Kwaeng Chatuchak
Khet Chatuchak
Bangkok 10900
Thailand

Copyright © 2000–2015 Nexant Inc.

