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World Carbon Black

Industry Study with Forecasts for **2013 & 2018**

Study #2596 | February 2010 | \$5700 | 284 pages

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Growth in carbon black demand will be bolstered by a healthy global rubber market, with demand from the dominant tire sector outpaced by the non-tire rubber carbon black market.

Global demand to rise 4.3% yearly through 2013

World demand for carbon black is forecast to rise 4.3 percent per year through 2013 to 11.6 million metric tons, bolstered by a healthy global rubber market over the same period. Gains will be exaggerated to some extent by the fact that growth will be rising off a relatively weak base in 2008, when a significant part of the world experienced the beginnings of recession. The vast majority of carbon black finds use as reinforcement material in vulcanized rubber goods, with over 60 percent devoted to motor vehicle tires alone. Carbon black demand from the tire sector is projected to increase 3.7 percent per year through 2013 to 6.9 million metric tons. The non-tire rubber carbon black market will expand 4.8 percent per year through 2013 to 3.6 million metric tons.

Special blacks to offer best market opportunities

The market for special blacks will advance a strong 5.9 percent per year through 2013. While special blacks comprise less than ten percent of the overall global carbon black market on a tonnage basis, they command considerably higher per-kilogram prices than commodity furnace blacks. Carbon black manufacturers will continue to spend a disproportionate amount of their re-

Asia/Pacific
57%

North America
15%

Western Europe
12%

Other Regions
16%

World Carbon Black Demand, 2013 (11.6 million metric tons)



search and development budgets on the special blacks sector. In addition to higher margins, a strong position in special blacks offers suppliers greater protection from cyclicalities in the highly interconnected rubber, tire and motor vehicle industries.

Asia/Pacific region to post strongest gains

The Asia/Pacific region will post the strongest gains in carbon black demand through 2013. The large markets of China and India will post particularly impressive gains due to a continuing rapid expansion in their respective motor vehicle and tire industries that will be

driven by robust economic growth in both nations. China and India saw the largest increases in new carbon black capacity among all countries of the world over the 2003 to 2008 period, a trend that will continue through 2013. Demand for carbon black in the developed parts of the world will continue to post below-average gains through 2013. Carbon black demand in the US and Western Europe will recover from declines experienced in 2008, but growth in both markets will continue to significantly lag the global average through 2013. The Japanese market holds particularly weak prospects, although growth in the country will be coming off a relatively strong 2008.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Supply & Demand

Carbon black demand in China is forecast to rise a strong metric tons, which is a significant increase. Although this market is still developing, its performance is expected to be world among all major markets. Rubber is forecast to reach 1.4 million metric tons in 2013, with demand in various industries continuing to grow. The level of economic development in China is forecast to rise, with applications in various sectors. Demand for carbon black is forecast to rise to 1.4 million metric tons in 2013, which is attributable to China's rapidly expanding industrial base, creating demand for products such as conveyor belts, mounts, impact-absorbing devices, bellows and grommets, factory floors, and the like. In addition to strong demand from industrial sectors, demand for non-tire rubber products will be boosted by healthy growth in vehicle production, which is increasing demand for rubber auto hoses, belts, gaskets, weatherstripping and bumpers. Note that the major factor includes bicycle and motorcycle tires, production of both of which is massive in China.

Special blacks account for less than nine percent of the carbon black market, but demand is expanding rapidly as the economy continues to develop. Aggregate demand will reach 1.4 million metric tons in 2013. The special blacks market in China is divided into plastic, ink and paint applications, with all three almost equally important. In much of the rest of the world, the paint sector is significant.

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TABLE VII-4

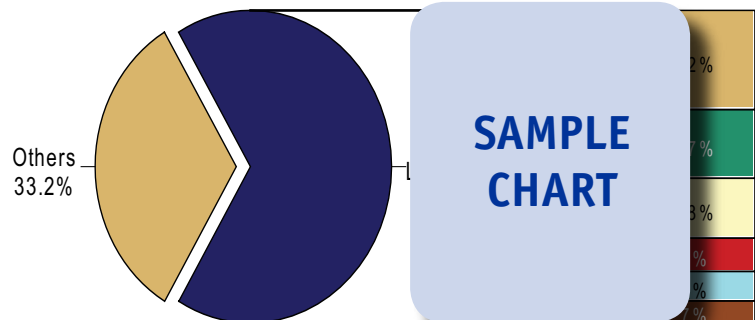
CHINA -- CARBON BLACK SUPPLY & DEMAND
(000 metric tons)

Item	1998	2003	2008	2013	2018
Population (millions)	1.2	1.4	1.5	1.6	1.7
\$ GDP/capita	2,000	3,000	4,000	5,000	6,000
Gross Domestic Product (bil 2007\$)	100	150	200	250	300
kg per capita	17.6	21.4	26.7	31.3	36.0
kg per 000\$ GDP	0.88	0.71	0.67	0.63	0.60
Rubber Consumption	1.0	1.2	1.4	1.6	1.8
Tires & Tire Components	0.9	1.1	1.3	1.5	1.7
Non-Tire Rubber Products	0.1	0.1	0.1	0.1	0.1
Parts per Hundred Rubber (PHR)	3.3	3.3	3.3	3.3	3.3
Carbon Black Consumption	0.5	0.6	0.7	0.8	0.9
Tires & Tire Components	0.4	0.5	0.6	0.7	0.8
Non-Tire Rubber Products	0.1	0.1	0.1	0.1	0.1
Special Blacks:	0.05	0.05	0.05	0.05	0.05
Plastics	0.05	0.05	0.05	0.05	0.05
Ink	0.05	0.05	0.05	0.05	0.05
Paints/Coatings	0.05	0.05	0.05	0.05	0.05
Other Markets	0.05	0.05	0.05	0.05	0.05
net exports	0.15	0.15	0.15	0.15	0.15
Carbon Black Production	0.720	0.720	0.720	0.720	0.720

SAMPLE
TABLE

CHART VIII-1

WORLD CARBON BLACK MARKET SHARE BY COMPANY, 2008
(\$9.2 billion)

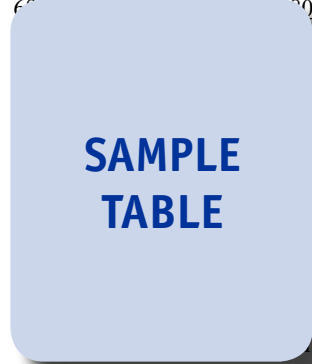


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE III-5
WORLD CARBON BLACK DEMAND BY REGION
 (000 metric tons)

Item	1998	2003	2008	2013	2018
Carbon Black Consumption	60	65	70	75	80
North America:					
United States	35	35	35	35	35
Canada & Mexico	5	5	5	5	5
Western Europe	10	10	10	10	10
Asia/Pacific:					
China	5	5	5	5	5
Japan	5	5	5	5	5
Other Asia/Pacific	5	5	5	5	5
Other Regions:					
Latin America	5	5	5	5	5
Eastern Europe	5	5	5	5	5
Africa/Mideast	5	5	5	5	5



COMPANY PROFILES

Koppers Incorporated
 436 Seventh Avenue
 Pittsburgh, PA 15219
 412-227-2001
<http://www.koppers.com>

Sales: \$
 Employe

Key Pro the tire, rubber, inks,
 plastic an

Kop er of carbon com-
 pounds a use in a variety of
 industrial applications. The Company operates in 2 segments: Carbon
 Materials and Chemicals, and Railroad and Utility Products.

The Company is active in the world carbon black industry through
 the Carbon Materials and Chemicals segment, which had sales of \$892
 million and employed 1,745 in 2008. Of the segment's total 2008
 sales, North America accounted for 44 percent, Europe represented
 29 percent, Australia accounted for 19 percent and China represented
 nine percent. Through the segment, Koppers is engaged in the produc-
 tion and sale of carbon black, creosote, carbon pitch, naphthalene and
 phthalic anhydride. In 2008, carbon black accounted for sales of \$65
 million. Koppers produces and sells carbon black via the Continental
 Carbon Australia Pty Limited (CCA) subsidiary.

CCA is Australia's leading producer of oil furnace-grade carbon
 black for the tire, rubber, inks, plastic and surface coatings industries.
 The company produces and sells carbon black in 15 grades under the
 CONTINEX and PLATINUM brand names. Specific grades include

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"Growth in carbon black demand will be all the more impressive considering that the Asia/Pacific region already supports the largest regional carbon black market in the world and that Japan, currently the third largest national market in the world, holds weak prospects through 2013. If Japan is excluded, growth in demand in the Asia/Pacific region would be 6.7 percent per year through 2013. Countries with the strongest growth prospects for carbon black demand include the large and developing markets of China and India. China will expand its share of global carbon black demand from 25 percent in 2008 to ..."
 --Section VII, pg. 120

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OTHER STUDIES

Activated Carbon

US activated carbon demand will grow 15.8% annually through 2014, driven mainly by stringent new air and water pollution laws. Powdered activated carbon (PAC) will be the main beneficiary of tighter industrial mercury controls, while granulated activated carbon (GAC) will benefit from new drinking water regulations. This study analyzes the 565 million pound US activated carbon industry, with forecasts for 2014 and 2019 by product, application and US regional market. It also evaluates company market share and profiles industry players.

#2713January 2011 \$5100

World Specialty Silicas

World specialty silicas demand will rise 6.3% yearly through 2014, driven by growth in key silica markets such as tires, rubber, chemicals and agricultural products. Precipitated silica will remain the dominant product type and lead gains. The Asia/Pacific region will grow at the fastest pace. This study analyzes the two million metric ton world specialty silica industry, with forecasts for 2014 and 2019 by product, market, world region and for 14 countries. It also evaluates company market share and profiles industry participants.

#2644June 2010 \$5800

Industrial Rubber Products

US industrial rubber product demand will rise 6% yearly through 2014, driven mainly by rebounding levels of motor vehicle production and accelerating output in the machinery industry. Mechanical rubber goods will remain dominant and grow the fastest. Machinery will be the fastest growing market. This study analyzes the \$13.2 billion US industrial rubber product industry, with forecasts for 2014 and 2019 by raw material, product and market. It also evaluates company market share and profiles industry players.

#2620April 2010 \$4800

World Rubber & Tire

Global rubber consumption will rise 4.1% yearly through 2013. The Asia/Pacific region will remain the largest and fastest-growing market. Non-tire rubber demand will outpace tire rubber. Tire rubber will continue to benefit from strong growth in Asia, despite a decline in rubber usage per tire. This study analyzes the 22 million metric ton world rubber industry, with forecasts for 2013 and 2018 by type, market, world region and for 30 countries. It also evaluates company market share and profiles industry players.

#2575January 2010 \$5900

Specialty Silicas

US specialty silica demand is projected to increase 3.7% annually through 2013, led by healthy advances in the large precipitated silica segment. The tire rubber market will expand at an above-average rate, reflecting greater use of precipitated silica in the production of "green" tires, which offer increased fuel efficiency and enhanced performance. This study analyzes the \$1.4 billion US specialty silica industry, with forecasts for 2013 and 2018 by product and market. It also evaluates company market share and profiles industry players.

#2491April 2009 \$4600

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