



Market Insights: C5 Chemicals - 2020

Market Insights: C5 Chemicals - 2020 is one in a series of reports published as part of Nexant's Markets & Profitability program.

Nexant's upcoming Market Insights report provides a comprehensive review of global C5 Chemicals market, including isoprene, DCPD and piperylene and includes:

- Discussion regarding key market drivers and constraints for each region
- Supply, demand trade for nine regions: North America, South America, Western Europe, Central Europe, Eastern Europe, Middle East, Africa, Asia Pacific, and China
- Competitiveness analysis, including competitive landscape, who's who of suppliers and cost competitiveness
- Price forecasts with commentary regarding latest trends
- Forecast period: 10 years history and 15 year forecast to 2035

Along with the written report, data is provided in Excel including global capacity listings.

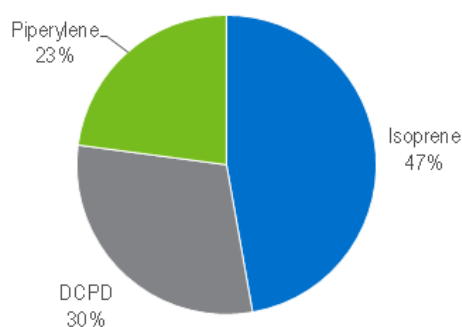
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Report Abstract:

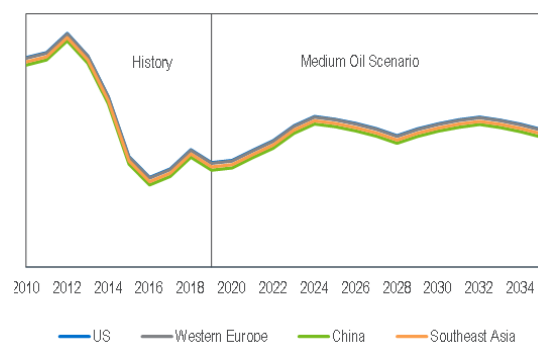
The mixed C5 stream from the steam cracker is a rich source of diolefins, which are used as feedstocks for a wide variety of derivatives, including hydrocarbon resins, elastomers of various kinds, and even fine chemicals. This stream, contained within pyrolysis gasoline (pygas), is comprised of paraffins, olefins, and diolefins. The normal fate for these C5 hydrocarbons within most steam cracker complexes is in the gasoline pool or in recycle co-cracking. However, some steam crackers depentanise the co-product pygas, opening up several options to add chemical value to the C5 stream. The major C5 components which are currently extracted or synthesised for chemical uses include isoprene, dicyclopentadiene (DCPD), and piperylene.

The key end-use sectors impacting overall C5 chemicals demand include the tyre and automotive industries, as well as the adhesives and construction sector, amongst others. Some of the markets for the major derivatives of C5 chemicals, such as polyisoprene, styrene block copolymers, or even certain hydrocarbon resins, may generally be associated with high entry barriers. Forward integration in such derivatives is significant in some cases, while businesses heavily based on merchant sales are also prevalent in other cases.

C5 Chemicals Demand, 2019
Approx. 2.5 million tons



Isoprene Price Forecast: Medium Scenario



Due to the nature of these chemicals as intermediates for the production of finished petrochemical products, the demand of isoprene, DCPD and piperylene is thus highly dependent on the capacity development of their respective derivative plants. As such, the economic competitiveness and supply availability of the C5 feedstocks across the value chain play a big part on whether the demand growth for these C5 chemicals align with their end-market industries demand growth in different regions.

Business models currently employed in the global isoprene and piperylene industries include full integration, partial integration (i.e. forward integration or backward integration in C5 streams), and no integration. Compared to the supply of isoprene, the

supply of DCPD is characterised by a lower producer concentration as well as lower levels of forward integration.

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Each region section in Chapter 3 includes:

- Market Overview
- Market Drivers
- Market Constraints
- Competitive Landscape
- Supply and Demand
- Imports and Exports

All sections are segmented by C5 product.

For additional analysis on C5 Chemicals, please refer to:

- [Market Insights: Styrene Block Copolymers - 2019](#)
- [Special Report: C5 Chemicals: Unlocking Hidden Opportunities in Steam Crackers?](#)
- [TECH: Isoprene Derivatives \(2016 Program\)](#)
- [Biorenewable Insights: Isoprene and Isoprenoids \(2016 Program\)](#)

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Markets and Profitability tracks over 60 feedstocks, petrochemicals, polymers, chemical intermediates and fertilizers on an ongoing basis and provides regularly updated reports covering all commercial aspects of these global industries. The accompanying database, provides global analysis and forecasts in two major inter-related areas: **Markets and Profitability**.

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