



Markets and Profitability

Market Analytics: Ethylene Propylene Diene Monomer (EPDM) - 2023



This Report was prepared by NexantECA, the Energy and Chemicals Advisory company ("NexantECA"). Except where specifically stated in this Report, the information contained herein is prepared on the basis of information that is publicly available, and contains no confidential third party technical information to the best knowledge and belief of NexantECA. The information has not been independently verified or otherwise examined to determine its accuracy, completeness or financial feasibility. Neither NexantECA, Subscriber nor any person acting on behalf of either shall have any liabilities for any loss or damage arising from or connected to the use of any information contained in this Report. NexantECA does not represent or warrant that any assumed conditions will come to pass.

The Report is for Subscriber's internal use only and shall be kept strictly confidential. The Report should not be otherwise reproduced, distributed or used without first obtaining prior written consent by NexantECA. Each Subscriber agrees to use reasonable effort to protect the confidential nature of the Report.

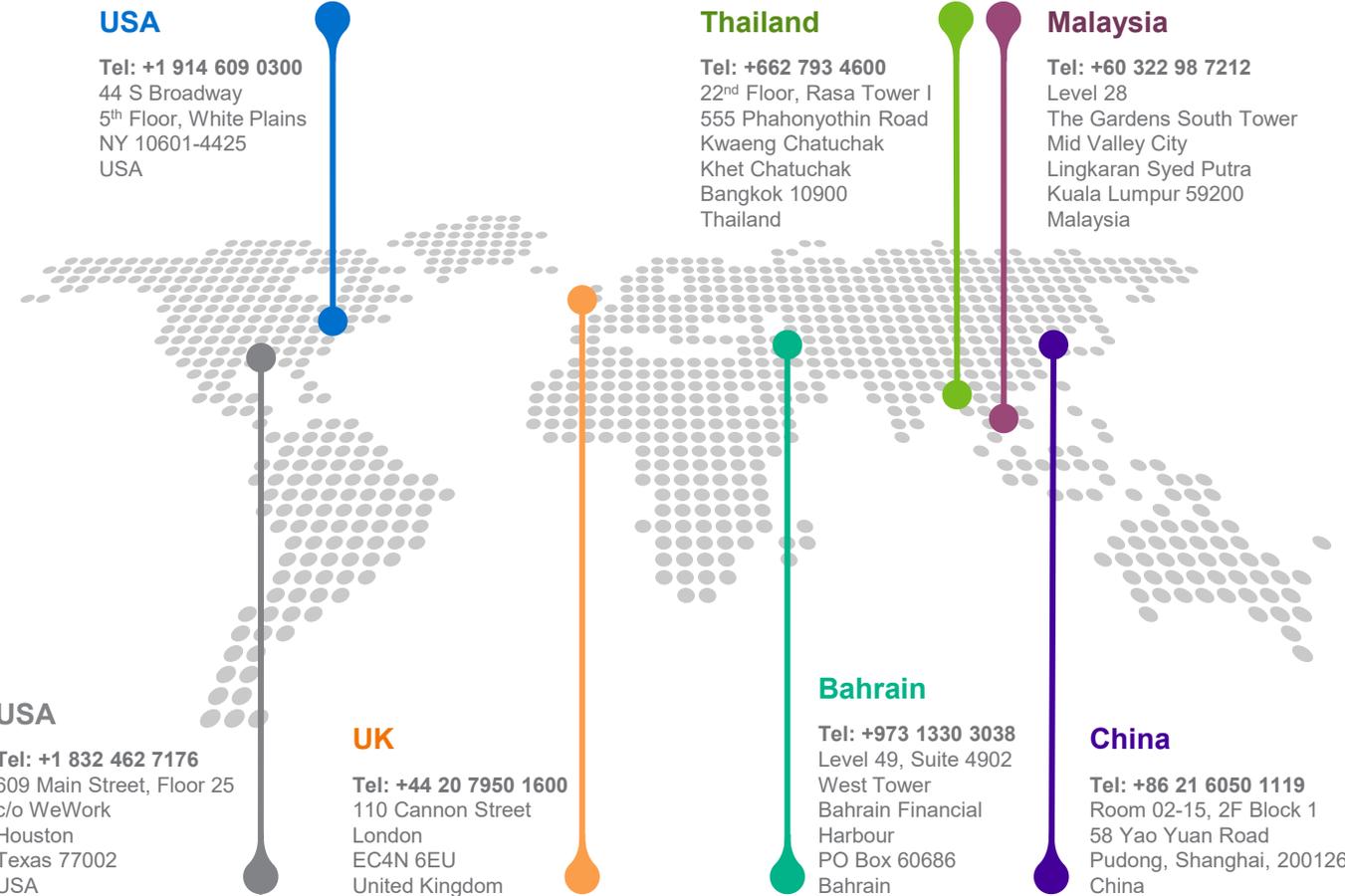
Copyright © by NexantECA (BV) Ltd. 2023. All rights reserved.



Table of contents

1	Executive Summary	3
2	Introduction	11
3	The Propylene Industry	17
4	End-use Sector Analysis	24
5	EPDM	34
6	Appendix – Methodology	87
7	Appendix – Process Technology	97

NexantECA partners with clients to help them navigate the big global energy, chemicals and materials issues of tomorrow. We provide independent advice through our consulting, subscriptions and reports, and training businesses using expertise developed in markets, economics and technology through our fifty years of operation. We are entirely dedicated to supporting sustainable development of the industry and provide expert advice with efficiency, speed, and agility.



USA
Tel: +1 914 609 0300
44 S Broadway
5th Floor, White Plains
NY 10601-4425
USA

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

Malaysia
Tel: +60 322 98 7212
Level 28
The Gardens South Tower
Mid Valley City
Lingkaran Syed Putra
Kuala Lumpur 59200
Malaysia

USA
Tel: +1 832 462 7176
609 Main Street, Floor 25
c/o WeWork
Houston
Texas 77002
USA

UK
Tel: +44 20 7950 1600
110 Cannon Street
London
EC4N 6EU
United Kingdom

Bahrain
Tel: +973 1330 3038
Level 49, Suite 4902
West Tower
Bahrain Financial
Harbour
PO Box 60686
Bahrain

China
Tel: +86 21 6050 1119
Room 02-15, 2F Block 1
58 Yao Yuan Road
Pudong, Shanghai, 200126
China

Disclaimer

This Report was prepared by NexantECA, the Energy and Chemicals Advisory company. Except where specifically stated otherwise in this Report, the information contained here is prepared on the basis of information that is publicly available, and contains no confidential third party technical information to the best knowledge of NexantECA. Aforesaid information has not been independently verified or otherwise examined to determine its accuracy, completeness or financial feasibility. Neither NexantECA, Client nor any person acting on behalf of either assumes any liabilities with respect to the use of or for damages resulting from the use of any information contained in this Report. NexantECA does not represent or warrant that any assumed conditions will come to pass.



Slide index

1 Executive Summary	<u>3</u>
EPDM	<u>5</u>
2 Introduction	<u>11</u>
3 The Propylene Industry	<u>17</u>
4 End-use Sector Analysis	<u>24</u>
5 EPDM	<u>34</u>
Global	<u>35</u>
North America	<u>43</u>
South America	<u>48</u>
Western Europe	<u>53</u>
Central Europe	<u>59</u>
Eastern Europe	<u>62</u>
Middle East	<u>67</u>
Africa	<u>73</u>
Asia Pacific	<u>76</u>
6 Appendix – Methodology	<u>87</u>
7 Appendix – Process Technology	<u>97</u>