



## Market Analytics: EPDM - 2023

**Market Analytics: Ethylene Propylene Diene Monomer (EPDM) - 2023** is one in a series of reports published as part of NexantECA's Markets & Profitability program.

Market Analytics: EPDM - 2023 report provides an in-depth analysis of the following products :

- EPDM

*Published: October 2023*

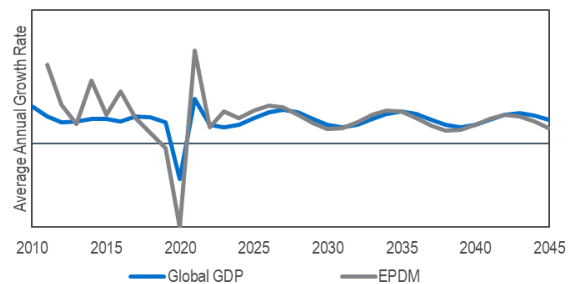
Along with the written report, NexantECA's Online Database includes supply, demand and trade analysis for 40 countries and global capacity listings updated on a monthly basis.

### Report Abstract:

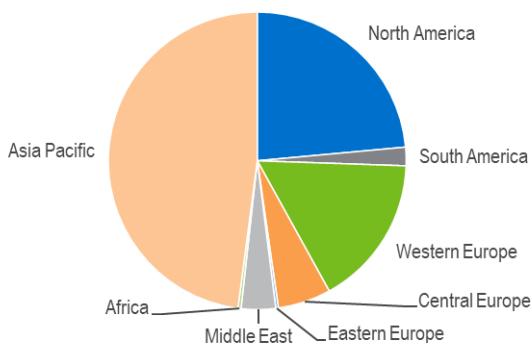
Ethylene propylene diene monomer (EPDM) is a commodity elastomer produced from ethylene, propylene and a termonomer such as dicyclopentadiene (DCDP), ethylidene norbornene (ENB) or vinyl norbornene (VNB), which are also produced in steam crackers. The industry consists mainly of olefins producers such as Dow Chemical and ExxonMobil, and elastomers producers such as ARLANXEO. EPDM is one of the most flexible synthetic elastomers, and its other key attributes are temperature and weather resistance. It therefore lends itself to applications such as vehicle door seals, hoses and gaskets, and roofing membranes for the building industry. A significant amount of EPDM is compounded with polyolefins to provide products which can be processed like polyolefins but have the properties of elastomers.

The largest market and driver for EPDM consumption is the automotive industry. Indirectly, there is a sizeable proportion of demand for TPVs and TPOs and all other segments, which are also influenced by the automotive industry. Global demand for TPOs and TPVs is concentrated in North America, Western Europe and Japan, reflecting their dominance in car production. Roofing is a smaller market and focused in developed regions. EPDM demand tends to follow peak and trough periods in the GDP cycle as the automotive and construction industries contribute to the underlying economic activity.

**Global EPDM Consumption Growth**  
*million tons*



**Global EPDM Demand, 2023**



Asia Pacific is the largest consumer of EPDM, and has the highest growth rates due to increased usage for automotive production in China. China's EPDM growth rates have always been strong and generally stayed above global consumption rates. China has contributed more than 50 percent of demand in the region between 2016 and 2023.

However, Asian demand declined by eight percent in 2020 during the COVID pandemic. Recovery was strong in 2021 but growth was limited to two percent in 2022 in the region, as local lockdowns in China were enforced due to new outbreaks of COVID which limited automotive production. Macroeconomic conditions also proved challenging in 2022 and led to suppressed global vehicle demand.

**For more information contact us at [Markets@NexantECA.com](mailto:Markets@NexantECA.com) or [www.NexantECA.com](http://www.NexantECA.com)**



# Market Analytics: EPDM - 2023

## Table of Contents:

1. Executive Summary
2. Introduction
3. The Propylene Industry
4. End-use Sector Analysis
5. EPDM

### Appendix

- A. Methodology
- B. Process Technology

Chapter 5 is segmented by key region:

- North America
- South America
- Western Europe
- Central Europe
- Eastern Europe
- Middle East
- 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 2045 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.

For related analysis, please refer to:

**Profitability and Price Forecasts: Ethylene Propylene Diene Monomer (EPDM) - 2023 Quarterly Business Analysis**

## Subscription Details:

Subscription to **Market Analytics: EPDM - 2023** includes:

- 12 month access via the NexantECA website, to:
  - Unlimited downloads of PDF reports
  - Downloadable data in Excel from the Online Database
- Webinar
- Consultation time with the project team

Customized subscriptions are also available.

### Contact Us:

For more information please contact

[Markets@NexantECA.com](mailto:Markets@NexantECA.com)

or

[www.NexantECA.com](http://www.NexantECA.com)



**NexantECA Subscriptions and Reports** 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, NexantECA provides solutions that our clients have relied upon for over 50 years.

The **Markets and Profitability** program comprises of the well-known Petroleum and Petrochemical Economics (PPE), PolyOlefins Planning Service (POPS), Strategic Business Analysis (SBA) and World Gas Analytics (WGAS).

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**.

NexantECA serves its clients from over 10 offices located throughout the Americas, Europe, the Middle East, Africa and Asia.

#### 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  
110 Cannon Street  
London, EC4N 6EU  
United Kingdom

#### Asia Pacific

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