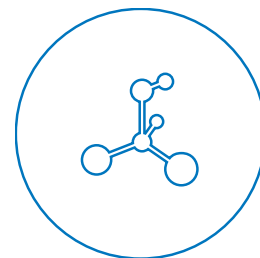


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PPE: Butadiene and Derivatives 2015

Market Dynamics Butadiene & Derivatives - 2015 is one in a series of reports published annually as part of the Petroleum and Petrochemical Economics program.

This report provides an in-depth analysis including:

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

To be published: June 2015

Abstract

The butadiene industry continues to be buffeted by both upstream and downstream pressures, and the unpredictable influence of competition from natural rubber. Following unprecedented tightness during 2011 and 2012, the butadiene market has been increasingly oversupplied, leading to increasingly low butadiene values relative to other olefins. The butylene dehydrogenation capacity that was rapidly developed in China in response to the high prices in 2011 and 2012 has not been economic in 2013 and 2014, and its contribution to supply has been minimal.

Downstream markets continue to struggle back towards historic growth rates, with developed economies still in recovery mode, and widespread economic problems affecting previous high growth markets such as China, Russia and Brazil.

Upstream, the surge in availability in light feedstocks resulting from shale exploitation in the United States is starting to affect butadiene production in other regions. LPG prices have fallen relative to naphtha in all regions, leading to increasing substitution for naphtha, and a proportional drop in heavier co-products such as butadiene.

Natural rubber prices remained low in 2014 and continued to exert substitution pressure on emulsion SBR in tyres and other rubber goods.

Growth of butadiene, which is a key raw material for production of synthetic rubber used in tyres and other vehicle applications, as well as general rubber goods, other polymers, and latex, is closely tied to production of vehicles and replacement tyres. As a result, butadiene demand is driven by GDP, new vehicle sales (for rubber, ABS and Nylon 6,6) and most importantly by the sales of replacement tyres.

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Each product chapter is segmented by key region and further segmented into three principle areas:

- Consumption: Assesses historic and forecast consumption; forecasts are based on projections of end use and economic activity in each region.
- 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 2030 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilization for each region.

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

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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

