

Carbon Black World Data Book 2008

A Market Research Report
published in **January 2009**

HISTORICAL TRENDS & FORECASTS

Supply & Demand	Foreign Trade
Types & Grades	Markets
Suppliers	Market Share
Capacity & Expansions	Pricing
Feedstocks	Regulatory Developments

Report Overview: Published annually, the *Carbon Black World Data Book* is an essential resource for anyone involved in the carbon black industry, whether as a feedstock supplier, a carbon black producer, or a carbon black purchaser. Subscribers to this report include seven of the world's ten largest carbon black producers, along with two of the world's three leading tire companies. The most recent edition of the report is based on the latest data available on the global motor vehicle, tire, rubber, and carbon black industries, including the effects of the current global economic crisis.

Report Coverage: This 494-page report provides an up-to-date and comprehensive overview of the \$11 billion global market for carbon black, a reinforcing filler and pigment used primarily in the rubber, plastics, paint, and ink industries. It provides detailed coverage for 27 leading countries, as well as volume demand for 14 smaller national markets. Data are provided for all years from 1997 through 2007, with projections for 2008 and forecasts for 2009, 2010, 2015, and 2025. Data provided include carbon black capacity, capacity utilization, production, imports by source, exports by destination, apparent consumption, demand by market (passenger tires, truck tires, other tires, non-tire rubber goods, and specialty) and demand by grade (tread, carcass, and other), as well as market value and average pricing. Rubber consumption and tire production also are provided for each country.

Current Industry Conditions: Coming off five years of unusually strong volume growth during the 2002 to 2007 period, the global carbon black industry saw fundamentals deteriorate steadily over the course of 2008, and by year-end the industry was facing its most challenging conditions in at least 25 years. Even prior to the emergence of the global financial crisis early in the fourth quarter, 2008 was shaping up to be one of the most difficult years on record for the carbon black industry, as steadily escalating feedstock costs in the first half of the year put intense pressure on profit margins and working capital due to contract lag. At the same time, OEM tire markets declined sharply along with new vehicle sales (with the SUV segment especially affected), while replacement tire markets suffered due to high gas prices (which reduced miles driven).

Suppliers have responded to these difficulties by scaling back or postponing expansions, shutting down or idling under-utilized capacity, and implementing operational improvements to reduce operating costs. Even with these measures, 2009 will be an extremely challenging year, particularly in the first half. *The Carbon Black World Data Book* chronicles the industry's current conditions in detail, and provides forecasts for short term recovery as well as long term growth.

Overview & Contents – Carbon Black World Data Book 2008 – Notch Consulting Group

Features: The 2008 edition of the *Carbon Black World Data Book* is fully revised and expanded. The most significant addition is a new pricing feature – quarterly carbon black pricing by region and major grade will be provided to subscribers for 2008 through 3Q 2009.

Other major features of the report include:

- A separate Excel spreadsheet containing all of the report's statistical data as well as extensive supplementary data;
- Tire markets for carbon black are now broken out by type of tire (passenger, truck, and other);
- Historical and projected capacity (through 2010) is provided for carbon black plants, including grades produced (where available);
- Historical and projected capacity is provided by producer, including affiliates and joint ventures;
- Carbon black imports by source and exports by destination are provided for 51 countries;
- Company sales and market share are provided by major region (North America, South America, European Union, Eastern Europe, Asia, Africa & the Mideast);
- The latest information is provided on capacity expansions, rationalizations, and project delays, as well as the net effect of these projects on installed capacity;
- Suppliers profiles have been updated and expanded

Pricing Options: The *Carbon Black World Data Book* is available in a variety of formats and subscription programs (figures in US\$):

- \$5,450: Single hard copy or electronic PDF version (single-user license);
- \$6,700: Electronic PDF with Electronic Corporate Use License (the license permits an unlimited number of users within your organization);
- \$7,450: Both print and electronic versions (single-user license);
- \$8,700: Both print and electronic versions (with multi-user license)



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