



# Global Rubber Process Oils:

## Market Analysis and Opportunities

Published April 2019

Base Year: 2018

Forecasts to 2023

Regional Coverage: Asia ■ Europe ■ North America ■ South America

Rubber process oils (RPO) function as internal lubricants, improve the blending of the rubber formulations, facilitate the incorporation of fillers and other additives, improve certain physical characteristics, and function as low-cost extenders. Group I plant closures and restriction on use of high poly aromatic hydrocarbon (PAH) content oils for tire manufacturing in Europe has created an opening for new products to penetrate this market. Against this backdrop, this report explores market opportunities for aromatic, paraffinic, and naphthenic rubber process oils.

### This Report Addresses Such Questions as:

- What is the overall global demand for rubber process oils? What is the share by region, end-use segment, and product type?
- What is the suitability of different rubber process oils for different applications?
- Who are the key suppliers for different rubber process oils?
- What are the performance requirements from different end-user applications, and how are they being met?
- What are the key growth drivers and restraints?
- What are the opportunities and threats for rubber process oil marketers?



# Report Contents

## Introduction

## Executive Summary

## Country Profiles

Each country profile covers product analysis, end-user industry analysis, and market analysis as elaborated below. List of countries covered are listed in Table 1.

### Product Analysis

This section covers paraffinic Group I, Group II, Group III, and GTL basestocks, naphthenic basestocks, DAE, TDAE, RAE, and MES.

- Classification of rubber process oils
- Physical, chemical, and performance characteristics
- Application areas
- Product pricing
- Inter-material competition
- Current potential supply and supply outlook
- Product development and trends

### End-User Industry Analysis

This section covers tire, other rubber products, and TPE manufacturing.

- Industry overview – size, structure, geographic spread, and growth
- Rubber products used – NR, IR, SBR, BR, CR, EPDM, Nitrile rubber, Polystyrene, TPE, and others
- Rubber process oils used, product specifications, consumption norms
- Regulations
- Rubber process oil consumption – overall, by region, by product type, by end-use applications, such as tire manufacturing and gloves, footwear, and other rubber goods manufacturing
- Industry growth and demand outlook
- Rubber process oil consumption by rubber suppliers and rubber goods manufacturers

## Market Analysis

- Market and product trends
- Demand growth
- Market opportunities and challenges

## Supplier Profiles

This section covers business background, product range, focus areas, manufacturing and sales, and outlook.

- Apar Industries
- Calumet
- CNOOC
- Cross Oil
- Ergon
- ExxonMobil
- H&R
- Holly Frontier
- HPCL
- IRPC
- JX Nippon
- Lotos Oil
- Lukoil
- Nynas
- Orgkhim
- PBF Energy
- Petrobras
- PetroChina Karamay
- Raj Petro Specialties
- Repsol
- Shell
- Sinopec
- Total

**Table 1: List of Countries Profiled**

Region	Countries
Asia	China, India, Indonesia, Japan, Malaysia, Thailand, and South Korea
Europe	Czech Republic, France, Germany, Italy, Poland, Russia, and Turkey
Americas	USA and Brazil



## Scope

Global Rubber Process Oils: Market Analysis and Opportunities provides a detailed appraisal of the global rubber process oils market, highlighting opportunities and challenges in different markets. The study covers the following:

- All rubber process oil products, including various aromatic (DAE, TDAE, RAE, TRAE, and MES), paraffinic, naphthenic, and bio products
- All major rubber and thermoplastic elastomers (TPE) types, including SBR, BR, CR, EPDM, IIR, IR, NR, and others
- Rubber process oil pricing
- Market estimates at the global and regional level, as well as detailed market estimates for all major country markets identified in the table of contents
- Key suppliers and market share
- Five and ten-year demand outlook and market appraisal

## Key Benefits

Subscribers of this report gain an understanding of the rubber process oil industry in terms of the key markets, end-use industries, growth drivers, and opportunities. The report helps subscribers to:

- Develop business strategies by understanding the economic, technological, and legislative trends shaping and driving the rubber process oil market.
- Design and develop products, marketing, and sales strategies targeting key end-use segments.
- Develop market-entry and market expansion strategies by evaluating current and future demand scenarios.
- Evaluate the major global rubber process oil suppliers and their products to identify gaps in product portfolios and evaluate new product introductions.
- Identify market segments poised for strong growth.



## Methodology

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60 years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

#### We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline's analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

### Secondary Research

#### We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline's internal database, consisting of over half a century's syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline's proven methodology allows exceptionally effective, precise, and reliable market

intelligence procurement and assessment, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 60 years.

#### A FULL SPECTRUM OF SERVICES

CUSTOM  
RESEARCH

MARKET  
RESEARCH  
REPORTS

MANAGEMENT  
CONSULTING

**North America**  
+1-973-435-3407

**Latin America**  
+55-11-3079-0792

**Europe**  
+32-2-770-4740

**China**  
+86-21-6012-6500

**India**  
+91-124-4546-100

**Japan**  
+81-3-3242-6277