Specialty Carbon Black Market - Global Outlook & Forecast 2024-2029

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Report description:

The global specialty carbon black market is expected to grow at a CAGR of 5.06% from 2023 to 2029.

MARKET TRENDS & ENABLER

Increasing Demand in the Electric & Electronic Industry

Over the years, there has been significant growth in the electrical and electronics sector, driven by the utilization of specialty carbon black in applications such as electromagnetic shielding, semi-conductive cable compounds, viscosity control additives, and pigmentation enhancements. The material's incorporation in wire and cable manufacturing has been prioritized to mitigate risks of premature failure or electrostatic discharge, particularly in electronic packaging and equipment. Hence, such factors are anticipated to propel the specialty carbon black market during the forecast period. Additionally, the increasing reliance on advanced consumer electronics, electric vehicles, and smart devices globally has shown the necessity of high-quality, conductive, and protective materials, further accelerating the specialty carbon black market expansion. For instance, According to Invest India, the global electronics market is valued at approximately $2 trillion, with India accounting for $118 billion, expected to reach $125 billion by 2025. Thus, such expansion of the electronics market is expected to significantly boost the demand for specialty carbon black during the forecast period.

Technological Advancements

Continuous innovation and technological advancements have been pivotal in expanding the specialty carbon black market. New technologies often lead to enhanced product performance, increased application efficiency, and improved customer satisfaction, thereby driving demand and market growth. For instance, Cabot Corporation has invested in advanced manufacturing processes to develop specialty carbon blacks with superior properties for lithium-ion battery applications, significantly enhancing energy storage capabilities in electric vehicles (EVs). This innovation aligns with the global push toward EV adoption and renewable energy solutions, contributing to the market's growth. Furthermore, the development of specialty carbon blacks is also driven by the wide usage of smart devices and 5G-enabled electronics. It provides enhanced electromagnetic shielding and heat dissipation, these materials support the growing demand for reliable and efficient electronic components, particularly in markets like India and China, where electronics manufacturing is rapidly expanding. These innovations enhance the functionality of products in various applications, including EVs, electronics, and packaging, and encourage industry players to invest in R&D to stay competitive. As industries such as automotive and electronics continue to grow and evolve, the specialty carbon black market is expected to benefit significantly from this advancement.

SEGMENTATION INSIGHTS

INSIGHTS BY GRADE TYPE

The global specialty carbon black market by grade type is segmented into standard, high, and ultra-high. The standard specialty carbon black market accounted for approximately 50% of the market share in 2023 and is estimated to grow at a significant CAGR during the forecast period. This growth is attributed to the rising demand for standard specialty carbon black in key industries such as construction, automotive, and paints & coatings. These sectors leverage its cost-effective properties for pigmentation, UV protection, and conductivity, making it a preferred choice for various applications. Meanwhile, the ultra-high-grade segment is expected to witness the fastest growth during the forecast period. This segment's rapid expansion is driven by its exceptional properties, including high purity, precise particle size distribution, and superior performance. These characteristics make ultra-high-grade specialty carbon black essential for advanced applications such as lithium-ion batteries, high-performance coatings, and conductive polymers, especially in the growing EV and renewable energy sectors.

Segmentation by Grade Type
- Standard
- High
- Ultra High

INSIGHTS BY FORMULATION

The granule formulation segment holds the largest global specialty carbon black market share. Granule-type specialty carbon black continues to dominate the market in terms of revenue share, primarily due to its ease of handling, lower dust emission, and high compatibility in plastics and rubber applications. Prominent players like Orion Engineered Carbons, Birla Carbon, and Cabot Corporation have strengthened their foothold in this segment by expanding production capabilities and introducing innovative products designed to meet the evolving needs of industries such as advanced plastic manufacturing and tire production. For instance, in 2023, Orion Engineered Carbons introduced several high-performance granule-based solutions specifically developed to support the demanding requirements of the automotive and construction sectors, showcasing their commitment to enhancing product functionality and addressing industry-specific challenges. Furthermore, the powder segment, on the other hand, is experiencing a CAGR of 5.67% in revenue during the forecast period due to its rising demand for lithium-ion batteries, conductive polymers, and coatings. The powder formulation is favored for its high surface area and ability to enhance electrical conductivity, which is critical in energy storage applications.

Segmentation by Formulation
- Granule
- Powder
- Other Forms

INSIGHTS BY PROCESS

The furnace black process segment accounted for approximately 36% of the global specialty carbon black market share by volume in 2023 and is anticipated to grow at a significant CAGR of 5.29% by value during the forecast period. Furnace black is produced through the thermal decomposition of hydrocarbons, often oil or coal, under high temperatures. It is widely used across various industries such as coatings, rubber products, plastics, and inks due to its excellent durability, color, and dispersion properties. Major players like Cabot Corporation and Orion Engineered Carbons continue to offer a wide range of products for applications, including industrial coatings, automotive components, and consumer goods. Furthermore, the acetylene black segment is experiencing the highest growth, driven by its superior conductivity properties. This segment is increasing because of its advanced applications where high-performance electrical conductivity is crucial. As demand for EVs and energy storage solutions rises, the acetylene black segment is expected to continue its strong growth during the forecast period.

Segmentation by Process
- Furnace Black
- Gas Black
- Acetylene Black
- Thermal Black
- Other Processes

INSIGHTS BY APPLICATION

The global specialty carbon black market by application into segmented into polymers, ink & toners, paints & coatings, battery & storages, and other applications. The polymers segment accounted for more than 30% of the market share in 2023 by value driven by its indispensable role in the production of plastic components, automotive parts, packaging, and consumer goods. Specialty carbon black is widely used in the polymer industry as a reinforcing agent, UV stabilizer, and to improve the material's tensile strength and resistance to cracking. The growing demand for durable and lightweight polymers in industries such as automotive, construction, and electronics continues to fuel the need for specialty carbon black. Further, the paints & coatings segment is growing at a high CAGR of 5.38% by volume driven by their ability to improve pigmentation, weather resistance, and UV protection. This makes it a key material in the formulation of coatings for automotive, construction, and consumer goods.

Segmentation by Application
- Polymers
- Ink & Toners
- Paints & Coatings
- Battery & Storages
- Other Applications

INSIGHTS BY END-USERS

The global specialty carbon black market by end-users into segmented into automotive, printing & packaging, construction, electric & electronics, wind energy, and other users. The automotive segment accounts for the largest share of the market. This dominance can be attributed to its extensive use in tire manufacturing, rubber reinforcements, and automotive coatings. The growing demand for EVs further strengthens this segment's market share. EV components such as battery casings and charging cables benefit from the conductive and antistatic properties of specialty carbon black. With the automotive industry's push towards sustainability and lighter materials, the demand for specialty carbon black is expected to expand during the forecast period. Additionally, the electric & electronics end-user sector is the fastest-growing segment of the specialty carbon black market, showing a high CAGR. Its growth is fueled by the material's conductivity and antistatic properties, essential for applications such as semiconductors, conductive coatings, and electrostatic discharge (ESD) protection.

Segmentation by End-Users
-Automotive
-Printing & Packaging
-Construction
-Electric & Electronics
-Wind Energy
-Other Users

GEOGRAPHICAL ANALYSIS

The APAC region accounted for the largest global specialty carbon black market, approximately 41% by value, in 2023, largely due to the presence of manufacturing plants. The market growth in this region is fueled by the increasing construction activities in countries such as China, Japan, South Korea, and India. According to Global Construction Perspectives and Oxford Economics, the global construction market is expected to grow by USD 8 trillion by 2030, driven primarily by China, the US, and India. Furthermore, as per Invest India projects construction activity is to expand at a rate of 7.1% annually. The growing demand for specialty carbon black in industries like automotive, electronics, and others further contributes to the market's growth in the region during the forecast period. Moreover, the rise of the consumer electronics sector in India, South Korea, China, and Japan further propels the market growth in Asia Pacific.
North America holds a significant share of the global specialty carbon black market due to the high penetration of both commercial and residential sectors. The region holds several key industries, including automotive, construction, aerospace, electronics, and packaging. Also, the region?s market growth is driven by the increasing use of ink and toner applications. Additionally, the growing demand for furnace black in various industrial applications such as belts, vibration isolation devices, air springs, and hoses is expected to further propel market expansion in the region. Furthermore, the European specialty carbon black market holds a substantial share, driven by advanced electronic devices, well-established industries, and increasing demand for electric vehicles. Among European countries, Germany led the industry with the largest share, while Spain emerged as the fastest-growing market for specialty carbon black. Innovations in automotive parts manufacturing, increasing demand for sustainable chemicals in construction activities, and a flourishing renewable energy industry are key factors pushing demand for carbon black in the region.
Although Latin America, the Middle East, and Africa hold a smaller market share, these regions are expected to experience significant growth in the global specialty carbon black market. Technological innovations, rapid industrial development, and evolving government policies are driving the expansion of end-use industries in these areas, thereby supporting the market demand. In 2023, Brazil led the industry in Latin America, supported by growth in the construction, electronics, and transportation sectors. With a limited number of manufacturers, the Middle East and Africa rely heavily on imports from Asia Pacific, Europe, and North America.

Segmentation by Geography

-APAC
oChina
oJapan
oIndia
oSouth Korea
oAustralia
oThailand
-North America
oThe U.S.
oCanada

- Europe
o Germany
o The U.K.
o France
o Italy
o Spain
o Sweden
- Latin America
o Brazil
o Mexico
o Argentina
o Chile
- Middle East & Africa
o UAE
o South Africa
o Saudi Arabia
o Turkey

VENDORS LANDSCAPE

The global specialty carbon black market is fragmented because of several international and local players who are heavily investing in research and development to diversify their product offerings, driving further market growth. Major players in the market, including Aditya Birla Group (Birla Carbon), Cabot Corporation, Orion S.A., Phillips Carbon Black Limited, Imerys, Mitsubishi Chemical Corporation, and Denka Company Limited, among others are working to boost market demand by investing in R&D efforts.
These companies are also adopting various strategic measures, such as launching new products, entering into contractual agreements, pursuing mergers and acquisitions, increasing investments, and forming collaborations with other organizations to expand their global presence. For instance, Orion Engineered Carbons expanded its production capacity for gas black in Germany in 2023. With this capacity expansion, the company strengthened its leadership in the specialty carbon black market. In 2023, Himadri Speciality Chemical Ltd approved the brownfield expansion of a new specialty carbon black line increasing the total specialty carbon black capacity to 130,000 metric tonnes per annum.

Recent Developments in the Global Specialty Carbon Black Market

- In 2024, Himadri Speciality Chemical Ltd announced its plans to invest USD 2.64 billion to expand its specialty carbon black capacity in Singur, West Bengal. The project aims to address rising European demand, driven by an upcoming EU ban on Russian imports. Scheduled for completion in 18 months, the expansion will boost the company's annual production capacity by 70,000 tonnes, increasing total capacity from 180,000 to 250,000 tons.
- In 2024, Birla Carbon announced Greenfield Expansions in the APAC region. The company is likely to expand its carbon black capacity by over 240 kilotons in the identified locations of India and Thailand.
- In 2023, Orion S.A. unveiled its first circular specialty carbon black for polymers at the 2023 Compounding World Expo North America, held in Cleveland. The company will also present carbon blacks, enhancing rheology, UV resistance, and conductivity.
- In 2023 Orion Engineered Carbons and Ion Specialties partnered for Mexico sales. This partnership aimed to enhance Orion's presence in the Mexican market by leveraging ION Specialties' established infrastructure, including warehouses, laboratories, and logistical support.
- In 2023, Cabot Corporation launched a novel product family REPLASBLAK with certified material. The company launched three products with this launch that are sold as its first certified black master-batch products as (ISCC PLUS) International Sustainability

& Carbon Certification.

Key Company Profiles

- Aditya Birla Group
- Cabot Corporation
- Orion S.A.
- Himadri Specialty Chemical Ltd.
- PCBL Chemical Limited

Other Prominent Vendors

- Black Bear Carbon
- Continental Carbon Company
- Jiangxi Black Cat Carbon Black Inc., Ltd
- Omsk Carbon Group
- Imerys Graphite & Carbon
- OCI Company Ltd.
- Denka Company Limited
- Akrochem Corporation
- Mitsubishi Chemical Group Corporation
- Ralson Carbon
- PentaCarbon
- Beilum Carbon Chemical Limited
- M J Pigment & Additives
- ADL NRG GmbH
- Lehmann & Voss & Co.

KEY QUESTIONS ANSWERED:

1. How big is the global specialty carbon black market?
2. What is the growth rate of the global specialty carbon black market?
3. Which region dominates the global specialty carbon black market share?
4. Who are the key players in the global specialty carbon black market?
5. What are the significant trends in the specialty carbon black market?

Table of Contents:

1. SCOPE & COVERAGE
1.1. MARKET DEFINITION
1.1.1. INCLUSIONS
1.1.2. EXCLUSIONS
1.1.3. MARKET ESTIMATION CAVEATS
1.2. SEGMENTS COVERED & DEFINITION
1.2.1. MARKET SEGMENTATION BY GRADE TYPE
1.2.2. MARKET SEGMENTATION BY FORMULATION
1.2.3. MARKET SEGMENTATION BY PROCESS
1.2.4. MARKET SEGMENTATION BY APPLICATION

1.2.5. MARKET SEGMENTATION BY END-USERS
1.2.6. REGIONS & COUNTRIES COVERED
1.3. MARKET DERIVATION
1.3.1. HISTORIC, BASE, & FORECAST YEARS
2. PREMIUM INSIGHTS
2.1. OPPORTUNITY POCKETS
2.2. REGIONAL INSIGHTS
2.3. OVERVIEW
2.4. MARKET TRENDS & ENABLER
2.4.1. INCREASING DEMAND IN ELECTRIC & ELECTRONIC INDUSTRY
2.4.2. TECHNOLOGICAL ADVANCES
2.5. SEGMENTATION ANALYSIS
2.5.1. GRADE TYPE
2.5.2. PROCESS
2.5.3. APPLICATION
2.6. REGIONAL INSIGHTS
2.7. VENDORS LANDSCAPE
3. MARKET AT A GLANCE
4. INTRODUCTION
4.1. OVERVIEW
4.2. SPECIALTY CARBON BLACK VS RUBBER CARBON BLACK
4.3. RISING DEMAND FROM THE WIND ENERGY INDUSTRY
4.4. ROBUST EXPANSION OF MARINE INDUSTRY
4.5. STRINGENT REGULATIONS
4.5.1. ENVIRONMENTAL REGULATIONS
4.5.2. HEALTH AND SAFETY REGULATIONS
4.5.3. PRODUCT QUALITY AND STANDARDS
5. MARKET OPPORTUNITIES & TRENDS
5.1. SHIFT TOWARD SUSTAINABILITY
5.2. INCREASING CONSUMPTION OF LITHIUM-ION BATTERIES
5.3. TECHNOLOGICAL ADVANCES
6. MARKET GROWTH ENABLERS
6.1. INCREASING DEMAND IN ELECTRIC & ELECTRONIC INDUSTRY
6.2. GROWING DEMAND FOR ADVANCED PLASTICS
6.3. ROBUST GROWTH OF CONSTRUCTION SECTOR
7. MARKET RESTRAINTS
7.1. HIGH PRODUCTION COST
7.2. HAZARDOUS ENVIRONMENTAL EMISSION
7.3. FLUCTUATIONS IN RAW MATERIAL PRICES
8. MARKET LANDSCAPE
8.1. MARKET SIZE & FORECAST
8.2. FIVE FORCES ANALYSIS
8.2.1. THREAT OF NEW ENTRANTS
8.2.2. BARGAINING POWER OF SUPPLIERS
8.2.3. BARGAINING POWER OF BUYERS
8.2.4. THREAT OF SUBSTITUTES
8.2.5. COMPETITIVE RIVALRY

9. GRADE TYPE
9.1. MARKET SNAPSHOT & GROWTH ENGINE (VALUE)
9.3. MARKET SNAPSHOT & GROWTH ENGINE (VOLUME)
9.4. MARKET OVERVIEW
9.5. STANDARD
9.5.1. MARKET SIZE & FORECAST
9.5.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
9.5.3. MARKET BY GEOGRAPHY (VALUE)
9.5.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
9.5.5. MARKET BY GEOGRAPHY (VOLUME)
9.6. HIGH
9.6.1. MARKET SIZE & FORECAST
9.6.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
9.6.3. MARKET BY GEOGRAPHY (VALUE)
9.6.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
9.6.5. MARKET BY GEOGRAPHY (VOLUME)
9.7. ULTRA HIGH-GRADE
9.7.1. MARKET SIZE & FORECAST
9.7.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
9.7.3. MARKET BY GEOGRAPHY (VALUE)
9.7.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
9.7.5. MARKET BY GEOGRAPHY (VOLUME)
10. FORMULATION
10.1. MARKET SNAPSHOT & GROWTH ENGINE (VALUE)
10.2. MARKET SNAPSHOT & GROWTH ENGINE (VOLUME)
10.3. MARKET OVERVIEW
10.4. GRANULE
10.4.1. MARKET SIZE & FORECAST
10.4.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
10.4.3. MARKET BY GEOGRAPHY (VALUE)
10.4.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
10.4.5. MARKET BY GEOGRAPHY (VOLUME)
10.5. POWDER
10.5.1. MARKET SIZE & FORECAST
10.5.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
10.5.3. MARKET BY GEOGRAPHY (VALUE)
10.5.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
10.5.5. MARKET BY GEOGRAPHY (VOLUME)
10.6. OTHER FORMS
10.6.1. MARKET SIZE & FORECAST
10.6.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
10.6.3. MARKET BY GEOGRAPHY
10.6.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
10.6.5. MARKET BY GEOGRAPHY
11. PROCESS
11.1. MARKET SNAPSHOT & GROWTH ENGINE (VALUE)
11.2. MARKET SNAPSHOT & GROWTH ENGINE (VOLUME)

11.3. MARKET OVERVIEW
11.4. FURNACE BLACK
11.4.1. MARKET SIZE & FORECAST
11.4.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
11.4.3. MARKET BY GEOGRAPHY (VALUE)
11.4.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
11.4.5. MARKET BY GEOGRAPHY (VOLUME)
11.5. GAS BLACK
11.5.1. MARKET SIZE & FORECAST
11.5.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
11.5.3. MARKET BY GEOGRAPHY (VALUE)
11.5.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
11.5.5. MARKET BY GEOGRAPHY (VOLUME)
11.6. ACETYLENE BLACK
11.6.1. MARKET SIZE & FORECAST
11.6.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
11.6.3. MARKET BY GEOGRAPHY (VALUE)
11.6.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
11.6.5. MARKET BY GEOGRAPHY (VOLUME)
11.7. THERMAL BLACK
11.7.1. MARKET SIZE & FORECAST
11.7.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
11.7.3. MARKET BY GEOGRAPHY
11.7.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
11.7.5. MARKET BY GEOGRAPHY
11.8. OTHER PROCESSES
11.8.1. MARKET SIZE & FORECAST
11.8.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
11.8.3. MARKET BY GEOGRAPHY (VALUE)
11.8.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
11.8.5. MARKET BY GEOGRAPHY (VOLUME)
12. APPLICATION
12.1. MARKET SNAPSHOT & GROWTH ENGINE (VALUE)
12.2. MARKET SNAPSHOT & GROWTH ENGINE (VOLUME)
12.3. MARKET OVERVIEW
12.4. POLYMERS
12.4.1. MARKET SIZE & FORECAST
12.4.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
12.4.3. MARKET BY GEOGRAPHY (VALUE)
12.4.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
12.4.5. MARKET BY GEOGRAPHY (VOLUME)
12.5. INK & TONERS
12.5.1. MARKET SIZE & FORECAST
12.5.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
12.5.3. MARKET BY GEOGRAPHY (VALUE)
12.5.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
12.5.5. MARKET BY GEOGRAPHY (VOLUME)

12.6. PAINTS & COATINGS
12.6.1. MARKET SIZE & FORECAST
12.6.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
12.6.3. MARKET BY GEOGRAPHY (VALUE)
12.6.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
12.6.5. MARKET BY GEOGRAPHY (VOLUME)
12.7. BATTERY & STORAGES
12.7.1. MARKET SIZE & FORECAST
12.7.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
12.7.3. MARKET BY GEOGRAPHY (VALUE)
12.7.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
12.7.5. MARKET BY GEOGRAPHY (VOLUME)
12.8. OTHER APPLICATIONS
12.8.1. MARKET SIZE & FORECAST
12.8.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
12.8.3. MARKET BY GEOGRAPHY (VALUE)
12.8.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
12.8.5. MARKET BY GEOGRAPHY (VOLUME)
13. END-USERS
13.1. MARKET SNAPSHOT & GROWTH ENGINE (VALUE)
13.2. MARKET SNAPSHOT & GROWTH ENGINE (VOLUME)
13.3. MARKET OVERVIEW
13.4. AUTOMOTIVE
13.4.1. MARKET SIZE & FORECAST
13.4.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
13.4.3. MARKET BY GEOGRAPHY (VALUE)
13.4.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
13.4.5. MARKET BY GEOGRAPHY (VOLUME)
13.5. PRINTING & PACKAGING
13.5.1. MARKET SIZE & FORECAST
13.5.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
13.5.3. MARKET BY GEOGRAPHY (VALUE)
13.5.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
13.5.5. MARKET BY GEOGRAPHY (VOLUME)
13.6. CONSTRUCTION
13.6.1. MARKET SIZE & FORECAST
13.6.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
13.6.3. MARKET BY GEOGRAPHY (VALUE)
13.6.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
13.6.5. MARKET BY GEOGRAPHY (VOLUME)
13.7. ELECTRIC & ELECTRONICS
13.7.1. MARKET SIZE & FORECAST
13.7.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
13.7.3. MARKET BY GEOGRAPHY (VALUE)
13.7.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
13.7.5. MARKET BY GEOGRAPHY (VOLUME)
13.8. WIND ENERGY

13.8.1. MARKET SIZE & FORECAST
13.8.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
13.8.3. MARKET BY GEOGRAPHY (VALUE)
13.8.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
13.8.5. MARKET BY GEOGRAPHY (VOLUME)
13.9. OTHER APPLICATION
13.9.1. MARKET SIZE & FORECAST
13.9.2. HISTORIC: MARKET BY GEOGRAPHY (VALUE)
13.9.3. MARKET BY GEOGRAPHY (VALUE)
13.9.4. HISTORIC: MARKET BY GEOGRAPHY (VOLUME)
13.9.5. MARKET BY GEOGRAPHY (VOLUME)
14. GEOGRAPHY
14.1. MARKET SNAPSHOT & GROWTH ENGINE (VALUE)
14.2. MARKET SNAPSHOT & GROWTH ENGINE (VOLUME)
14.3. GEOGRAPHIC OVERVIEW
15. APAC
15.1. MARKET SIZE & FORECAST
15.2. GRADE TYPE
15.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
15.2.2. MARKET SIZE & FORECAST (VALUE)
15.2.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
15.2.4. MARKET SIZE & FORECAST (VOLUME)
15.3. FORMULATION
15.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
15.3.2. MARKET SIZE & FORECAST (VALUE)
15.3.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
15.3.4. MARKET SIZE & FORECAST (VOLUME)
15.4. PROCESS
15.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
15.4.2. MARKET SIZE & FORECAST (VALUE)
15.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
15.4.4. MARKET SIZE & FORECAST (VOLUME)
15.5. APPLICATION
15.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
15.5.2. MARKET SIZE & FORECAST (VALUE)
15.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
15.5.4. MARKET SIZE & FORECAST (VOLUME)
15.6. END-USERS
15.6.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
15.6.2. MARKET SIZE & FORECAST (VALUE)
15.6.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
15.6.4. MARKET SIZE & FORECAST (VOLUME)
15.7. KEY COUNTRIES (VALUE)
15.8. KEY COUNTRIES (VOLUME)
15.9. CHINA: MARKET SIZE & FORECAST
15.10. JAPAN: MARKET SIZE & FORECAST
15.11. INDIA: MARKET SIZE & FORECAST

15.12. SOUTH KOREA: MARKET SIZE & FORECAST
15.13. AUSTRALIA: MARKET SIZE & FORECAST
15.14. THAILAND: MARKET SIZE & FORECAST
16. NORTH AMERICA
16.1. MARKET SIZE & FORECAST
16.2. GRADE TYPE
16.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
16.2.2. MARKET SIZE & FORECAST (VALUE)
16.2.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
16.2.4. MARKET SIZE & FORECAST (VOLUME)
16.3. FORMULATION
16.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
16.3.2. MARKET SIZE & FORECAST (VALUE)
16.3.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
16.3.4. MARKET SIZE & FORECAST (VOLUME)
16.4. PROCESS
16.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
16.4.2. MARKET SIZE & FORECAST (VALUE)
16.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
16.4.4. MARKET SIZE & FORECAST (VOLUME)
16.5. APPLICATION
16.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
16.5.2. MARKET SIZE & FORECAST (VALUE)
16.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
16.5.4. MARKET SIZE & FORECAST (VOLUME)
16.6. END-USERS
16.6.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
16.6.2. MARKET SIZE & FORECAST (VALUE)
16.6.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
16.6.4. MARKET SIZE & FORECAST (VOLUME)
16.7. KEY COUNTRIES (VALUE)
16.8. KEY COUNTRIES (VOLUME)
16.9. US: MARKET SIZE & FORECAST
16.10. CANADA: MARKET SIZE & FORECAST
17. EUROPE
17.1. MARKET SIZE & FORECAST
17.2. GRADE TYPE
17.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
17.2.2. MARKET SIZE & FORECAST (VALUE)
17.2.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
17.2.4. MARKET SIZE & FORECAST (VOLUME)
17.3. FORMULATION
17.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
17.3.2. MARKET SIZE & FORECAST (VALUE)
17.3.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
17.3.4. MARKET SIZE & FORECAST (VOLUME)
17.4. PROCESS

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17.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
17.4.2. MARKET SIZE & FORECAST (VALUE)
17.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
17.4.4. MARKET SIZE & FORECAST (VOLUME)
17.5. APPLICATION
17.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
17.5.2. MARKET SIZE & FORECAST (VALUE)
17.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
17.5.4. MARKET SIZE & FORECAST (VOLUME)
17.6. END-USERS
17.6.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
17.6.2. MARKET SIZE & FORECAST (VALUE)
17.6.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
17.6.4. MARKET SIZE & FORECAST (VOLUME)
17.7. KEY COUNTRIES (VALUE)
17.8. KEY COUNTRIES (VOLUME)
17.9. GERMANY: MARKET SIZE & FORECAST
17.10. UK: MARKET SIZE & FORECAST
17.11. FRANCE: MARKET SIZE & FORECAST
17.12. ITALY: MARKET SIZE & FORECAST
17.13. SPAIN: MARKET SIZE & FORECAST
17.14. SWEDEN: MARKET SIZE & FORECAST
18. LATIN AMERICA
18.1. MARKET SIZE & FORECAST
18.2. GRADE TYPE
18.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
18.2.2. MARKET SIZE & FORECAST (VALUE)
18.2.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
18.2.4. MARKET SIZE & FORECAST (VOLUME)
18.3. FORMULATION
18.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
18.3.2. MARKET SIZE & FORECAST (VALUE)
18.3.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
18.3.4. MARKET SIZE & FORECAST (VOLUME)
18.4. PROCESS
18.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
18.4.2. MARKET SIZE & FORECAST (VALUE)
18.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
18.4.4. MARKET SIZE & FORECAST (VOLUME)
18.5. APPLICATION
18.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
18.5.2. MARKET SIZE & FORECAST (VALUE)
18.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
18.5.4. MARKET SIZE & FORECAST (VOLUME)
18.6. END-USERS
18.6.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
18.6.2. MARKET SIZE & FORECAST (VALUE)

18.6.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
18.6.4. MARKET SIZE & FORECAST (VOLUME)
18.7. KEY COUNTRIES (VALUE)
18.8. KEY COUNTRIES (VOLUME)
18.9. BRAZIL: MARKET SIZE & FORECAST
18.10. MEXICO: MARKET SIZE & FORECAST
18.11. ARGENTINA: MARKET SIZE & FORECAST
18.12. CHILE: MARKET SIZE & FORECAST
19. MIDDLE EAST & AFRICA
19.1. MARKET SIZE & FORECAST
19.2. GRADE TYPE
19.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
19.2.2. MARKET SIZE & FORECAST (VALUE)
19.2.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
19.2.4. MARKET SIZE & FORECAST (VOLUME)
19.3. FORMULATION
19.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
19.3.2. MARKET SIZE & FORECAST (VALUE)
19.3.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
19.3.4. MARKET SIZE & FORECAST (VOLUME)
19.4. PROCESS
19.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
19.4.2. MARKET SIZE & FORECAST (VALUE)
19.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
19.4.4. MARKET SIZE & FORECAST (VOLUME)
19.5. APPLICATION
19.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
19.5.2. MARKET SIZE & FORECAST (VALUE)
19.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
19.5.4. MARKET SIZE & FORECAST (VOLUME)
19.6. END-USERS
19.6.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
19.6.2. MARKET SIZE & FORECAST (VALUE)
19.6.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
19.6.4. MARKET SIZE & FORECAST (VOLUME)
19.7. KEY COUNTRIES (VALUE)
19.8. KEY COUNTRIES (VOLUME)
19.9. UAE: MARKET SIZE & FORECAST
19.10. SOUTH AFRICA: MARKET SIZE & FORECAST
19.11. SAUDI ARABIA: MARKET SIZE & FORECAST
19.12. TURKEY: MARKET SIZE & FORECAST
20. COMPETITIVE LANDSCAPE
20.1. COMPETITION OVERVIEW
20.2. PRODUCTION CAPACITY
20.3. RECENT DEVELOPMENT
21. KEY COMPANY PROFILES
21.1. ADITYA BIRLA GROUP

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21.1.1. BUSINESS OVERVIEW
21.1.2. PRODUCT OFFERINGS
21.1.3. KEY STRATEGIES
21.1.4. KEY STRENGTHS
21.1.5. KEY OPPORTUNITIES
21.2. CABOT CORPORATION
21.2.1. BUSINESS OVERVIEW
21.2.2. PRODUCT OFFERINGS
21.2.3. KEY STRATEGIES
21.2.4. KEY STRENGTHS
21.2.5. KEY OPPORTUNITIES
21.3. ORION S.A.
21.3.1. BUSINESS OVERVIEW
21.3.2. PRODUCT OFFERINGS
21.3.3. KEY STRATEGIES
21.3.4. KEY STRENGTHS
21.3.5. KEY OPPORTUNITIES
21.4. HIMADRI SPECIALTY CHEMICAL LTD.
21.4.1. BUSINESS OVERVIEW
21.4.2. PRODUCT OFFERINGS
21.4.3. KEY STRATEGIES
21.4.4. KEY STRENGTHS
21.4.5. KEY OPPORTUNITIES
21.5. PHILIPS CARBON BLACK LIMITED
21.5.1. BUSINESS OVERVIEW
21.5.2. PRODUCT OFFERINGS
21.5.3. KEY STRATEGIES
21.5.4. KEY STRENGTHS
21.5.5. KEY OPPORTUNITIES
22. OTHER PROMINENT VENDORS
22.1. BLACK BEAR CARBON
22.1.1. BUSINESS OVERVIEW
22.1.2. PRODUCT OFFERINGS
22.2. CONTINENTAL CARBON COMPANY
22.2.1. BUSINESS OVERVIEW
22.2.2. PRODUCT OFFERINGS
22.3. JIANGXI BLACK CAT CARBON BLACK CO., LTD
22.3.1. BUSINESS OVERVIEW
22.3.2. PRODUCT OFFERINGS
22.4. OMSK CARBON GROUP
22.4.1. BUSINESS OVERVIEW
22.4.2. PRODUCT OFFERINGS
22.5. IMERYS GRAPHITE & CARBON
22.5.1. BUSINESS OVERVIEW
22.5.2. PRODUCT OFFERINGS
22.6. OCI COMPANY LTD
22.6.1. BUSINESS OVERVIEW

22.6.2. PRODUCT OFFERINGS
22.7. DENKA
22.7.1. BUSINESS OVERVIEW
22.7.2. PRODUCT OFFERINGS
22.8. AKROCHEM CORPORATION
22.8.1. BUSINESS OVERVIEW
22.8.2. PRODUCT OFFERINGS
22.9. MITSUBISHI CHEMICAL GROUP CORPORATION
22.9.1. BUSINESS OVERVIEW
22.9.2. PRODUCT OFFERINGS
22.10. RALSON CARBON
22.10.1. BUSINESS OVERVIEW
22.10.2. PRODUCT OFFERINGS
22.11. PENTACARBON
22.11.1. BUSINESS OVERVIEW
22.11.2. PRODUCT OFFERINGS
22.12. BEILUM CARBON CHEMICAL LIMITED
22.12.1. BUSINESS OVERVIEW
22.12.2. PRODUCT OFFERINGS
22.13. M J PIGMENT & ADDITIVES
22.13.1. BUSINESS OVERVIEW
22.13.2. PRODUCT OFFERINGS
22.14. ADL NRG GMBH
22.14.1. BUSINESS OVERVIEW
22.14.2. PRODUCT OFFERINGS
22.15. LEHMANN&VOSS&CO.
22.15.1. BUSINESS OVERVIEW
22.15.2. PRODUCT OFFERINGS
23. REPORT SUMMARY
23.1. KEY TAKEAWAYS
23.2. STRATEGIC RECOMMENDATIONS
24. QUANTITATIVE SUMMARY
24.1. VALUE
24.1.1. HISTORIC: MARKET BY GEOGRAPHY
24.1.2. MARKET BY GEOGRAPHY
24.2. VOLUME
24.2.1. HISTORIC: MARKET BY GEOGRAPHY
24.2.2. MARKET BY GEOGRAPHY
25. APAC
25.1. GRADE TYPE
25.1.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
25.1.2. MARKET SIZE & FORECAST (VALUE)
25.1.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
25.1.4. MARKET SIZE & FORECAST (VOLUME)
25.2. FORMULATION
25.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
25.2.2. MARKET SIZE & FORECAST (VALUE)

25.2.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
25.2.4. MARKET SIZE & FORECAST (VOLUME)
25.3. PROCESS
25.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
25.3.2. MARKET SIZE & FORECAST (VALUE)
25.3.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
25.3.4. MARKET SIZE & FORECAST (VOLUME)
25.4. APPLICATION
25.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
25.4.2. MARKET SIZE & FORECAST (VALUE)
25.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
25.4.4. MARKET SIZE & FORECAST (VOLUME)
25.5. END-USERS
25.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
25.5.2. MARKET SIZE & FORECAST (VALUE)
25.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
25.5.4. MARKET SIZE & FORECAST (VOLUME)
26. NORTH AMERICA
26.1. GRADE TYPE
26.1.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
26.1.2. MARKET SIZE & FORECAST (VALUE)
26.1.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
26.1.4. MARKET SIZE & FORECAST (VOLUME)
26.2. FORMULATION
26.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
26.2.2. MARKET SIZE & FORECAST (VALUE)
26.2.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
26.2.4. MARKET SIZE & FORECAST (VOLUME)
26.3. PROCESS
26.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
26.3.2. MARKET SIZE & FORECAST (VALUE)
26.3.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
26.3.4. MARKET SIZE & FORECAST (VOLUME)
26.4. APPLICATION
26.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
26.4.2. MARKET SIZE & FORECAST (VALUE)
26.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
26.4.4. MARKET SIZE & FORECAST (VOLUME)
26.5. END-USERS
26.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
26.5.2. MARKET SIZE & FORECAST (VALUE)
26.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
26.5.4. MARKET SIZE & FORECAST (VOLUME)
27. EUROPE
27.1. GRADE TYPE
27.1.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
27.1.2. MARKET SIZE & FORECAST (VALUE)

27.1.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
27.1.4. MARKET SIZE & FORECAST (VOLUME)
27.2. FORMULATION
27.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
27.2.2. MARKET SIZE & FORECAST (VALUE)
27.2.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
27.2.4. MARKET SIZE & FORECAST (VOLUME)
27.3. PROCESS
27.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
27.3.2. MARKET SIZE & FORECAST (VALUE)
27.3.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
27.3.4. MARKET SIZE & FORECAST (VOLUME)
27.4. APPLICATION
27.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
27.4.2. MARKET SIZE & FORECAST (VALUE)
27.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
27.4.4. MARKET SIZE & FORECAST (VOLUME)
27.5. END-USERS
27.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
27.5.2. MARKET SIZE & FORECAST (VALUE)
27.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
27.5.4. MARKET SIZE & FORECAST (VOLUME)
28. LATIN AMERICA
28.1. GRADE TYPE
28.1.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
28.1.2. MARKET SIZE & FORECAST (VALUE)
28.1.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
28.1.4. MARKET SIZE & FORECAST (VOLUME)
28.2. FORMULATION
28.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
28.2.2. MARKET SIZE & FORECAST (VALUE)
28.2.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
28.2.4. MARKET SIZE & FORECAST (VOLUME)
28.3. PROCESS
28.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
28.3.2. MARKET SIZE & FORECAST (VALUE)
28.3.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
28.3.4. MARKET SIZE & FORECAST (VOLUME)
28.4. APPLICATION
28.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
28.4.2. MARKET SIZE & FORECAST (VALUE)
28.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
28.4.4. MARKET SIZE & FORECAST (VOLUME)
28.5. END-USERS
28.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
28.5.2. MARKET SIZE & FORECAST (VALUE)
28.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)

28.5.4. MARKET SIZE & FORECAST (VOLUME)
29. MIDDLE EAST & AFRICA
29.1. GRADE TYPE
29.1.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
29.1.2. MARKET SIZE & FORECAST (VALUE)
29.1.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
29.1.4. MARKET SIZE & FORECAST (VOLUME)
29.2. FORMULATION
29.2.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
29.2.2. MARKET SIZE & FORECAST (VALUE)
29.2.3. HISTORIC: MARKET SIZE & FORECAST (VALUE)
29.2.4. MARKET SIZE & FORECAST (VOLUME)
29.3. PROCESS
29.3.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
29.3.2. MARKET SIZE & FORECAST (VALUE)
29.3.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
29.3.4. MARKET SIZE & FORECAST (VOLUME)
29.4. APPLICATION
29.4.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
29.4.2. MARKET SIZE & FORECAST (VALUE)
29.4.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
29.4.4. MARKET SIZE & FORECAST (VOLUME)
29.5. END-USERS
29.5.1. HISTORIC: MARKET SIZE & FORECAST (VALUE)
29.5.2. MARKET SIZE & FORECAST (VALUE)
29.5.3. HISTORIC: MARKET SIZE & FORECAST (VOLUME)
29.5.4. MARKET SIZE & FORECAST (VOLUME)
30. APPENDIX
30.1. RESEARCH METHODOLOGY
30.2. RESEARCH PROCESS
30.3. REPORT ASSUMPTIONS & CAVEATS
30.3.1. KEY CAVEATS
30.3.2. CURRENCY CONVERSION
30.4. ABBREVIATIONS

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