

Argus report sample

Butadiene Analytics

July 2024

Global: Economy

Central banks appear to have tamed inflation for now. The global GDP forecast continues to be revised lower for longer as China's growth lags.

GDP Forecast Assumptions

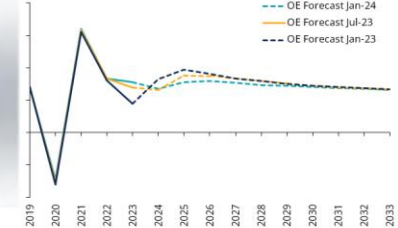
Inflation

Inflation will be more volatile than before the pandemic. Central banks are likely to keep inflation close to target in the medium and long term.

Monetary Policy

Central banks will cut rates this year. They will move cautiously to bring rates down slowly.

Global GDP growth rate forecast, Oxford Economics (OE)



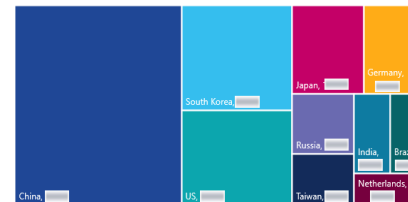
World butadiene industry overview, 2019–2033

Asia-Pacific will remain the production and demand center.

- China remains the leader for both BD production and consumption. Its ability to lift domestic consumption, find derivative export outlets and gain market share will sway global demand.
- Europe is in a delicate place as the industry undergoes strategic business reviews of assets.
- The US is on the cusp of becoming more balanced as imports slide during the last half of the forecast period.

Top 10 Countries – Butadiene Production Capacity, 2023

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Top 10 Countries – Butadiene Consumption Capacity, 2023

'000t



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About this report

Argus Butadiene is a data-driven evaluation of supply-demand fundamentals forecasts for butadiene markets, published twice a year.

The service includes a 10-year forecast and five-year history covering balances and capacities, organized by country and region.

In this sample, we share an overview of the global Butadiene industry as well as insights from North America.

Subscribers receive a PowerPoint PDF written by our experts plus the accompanying Excel data files.

To find out more, [click here to get in touch](#).

| Key features



10-year forecast and a five-year history

Features capacities, supply and demand and trade for leading derivatives, by country and region, published twice a year.



Detailed report

In an easy-to-read PowerPoint format focusing on new plant capacities, growth rates in relevant markets, and global trade flow.



Regional insight

Covering capacities and operating rates based on global trade and economics.



Downloadable datasets

With data on supply, demand, capacities, operating rates and trade balances, by country and region.



Access to specialists

Speak to the experts behind Argus' long-term analytics forecast services.

Butadiene Analytics Balance 2023; global supply, demand and trade by country

Subscription includes detailed Excel downloads



Associated Data, continued

Capacity list for Butadiene with first-line derivatives and Company Balances

Subscription
includes detailed
Excel downloads

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2024 Butadiene company balances, '000t

Butadiene Polybutadiene Styrene-Butac Styrene-Butac Styrene-Butac Acrylonitrile-B Nitrile Rubber Methylmethac Nitrile Rubber Styrenic Block Other - E

Capacity to consume butadiene

Region	Country	Company	Location	Butadiene	PBR	SBRs	SBL	SBRc	ABS	NBR	MBS	NBRX	SBC	ELAST
Middle East	Iran	Takht-e Jamshid Petrochemical	Bandar-e Mahshahr	0										
Middle East	Saudi Arabia	Arlanxco	Al Jubayl	0										
Middle East	Saudi Arabia	Al-Jubail Petrochemical	Al Jubayl	0										
North America	US	Lion Elastomers	Orange	0										
North America	US	Goodyear Tire & Rubber	Beaumont	0										
North America	US	Firestone Polymers	Lake Charles	0										
North America	US	Arlanxco												
Northeast Asia	China	Zhejiang Transfar Synthetic Materials												
Northeast Asia	China	Zhejiang Petrochemical												
Northeast Asia	China	Yulongdao Refining & Petrochemical												
Northeast Asia	China	TSRC-Ube												
Northeast Asia	China	Tianli High & New Tech												
Northeast Asia	China	Sinopec Shanghai Gaoqiao												
Northeast Asia	China	Shandong Yulong Petrochemicals												
Northeast Asia	China	Huayu Rubber												
Northeast Asia	China	Haopy New Materials Technology												
Northeast Asia	Japan	Ube Industries												
Northeast Asia	Taiwan	TSRC												
Northeast Asia	South Korea	Lotte Versalis Elastomers												
Northeast Asia	Japan	Japan Elastomer												
Northeast Asia	Japan	ENEOS												
Northeast Asia	Japan	Asahi Kasei												
Russia and Central Asia	Russia	Sibur												
Russia and Central Asia	Russia	Efremov Kautschuk												
South Asia	India	Indian Oil Corporation												
Southeast Asia	Thailand	Thai Synthetic Rubbers												
Southeast Asia	Indonesia	PT Synthetic Rubber Indonesia												
Southeast Asia	Malaysia	Lotte Ube Synthetic Rubber												
Southeast Asia	Malaysia	Lotte Ube Synthetic Rubber												
Southeast Asia	Singapore	Arlanxco												
Western Europe	United Kingdom	Versalis												
Western Europe	Germany	Synthos												
Western Europe	France	Michelin												
Western Europe	France	Arlanxco												
Western Europe	Germany	Arlanxco												
North America	US	Denka Performance Elastomers												
Northeast Asia	Japan	Tosoh												
Northeast Asia	Japan	Showa Denko												

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Capacity list for butadiene and its first-line derivatives, '000t

Product	Region	Country	Company	Location	Source	2019	2020	2021	2022	2023	2024	2025
Acrylonitrile-Butadiene-Styrene	Middle East	Iran	Tabriz Petrochemical	Tabriz								
Acrylonitrile-Butadiene-Styrene	Middle East	Saudi Arabia	Petrokemya	Al Jubayl								
Acrylonitrile-Butadiene-Styrene	Middle East	Iran	Jam Petrochemical	Bandar-e 'Asaluyeh								
Acrylonitrile-Butadiene-Styrene	Middle East	Iran	Ghaed Bassir Petrochemical	Isfahan								
Acrylonitrile-Butadiene-Styrene	North America	US	SABIC	Ottawa								
Acrylonitrile-Butadiene-Styrene	North America	US	SABIC	Bay Saint Louis								
Acrylonitrile-Butadiene-Styrene	North America	Mexico	SABIC	Altamira								
Acrylonitrile-Butadiene-Styrene	North America	Mexico	INEOS Styrolution	Altamira								
Acrylonitrile-Butadiene-Styrene	North America	US	INEOS Styrolution	Addyston								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Zhenjiang CHIMEI Chemical	Zhenjiang								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Zhejiang Petrochemical	Zhoushan								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Zhangzhou CHIMEI Chemical	Gulei								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Zhangzhou CHIMEI Chemical	Gulei								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Yulongdao Refining & Petrochemical	Yantai								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Tianjin Dagou Chemical	Tianjin								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	SP Chemicals	Lianyungang								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Sinopec Shanghai Gaoqiao	Gaoqiao								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Sinopec Maoming Petrochemical	Maoming								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Sinochem Lianyungang	Jiangsu								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Shanghai Huayi Polymer	Shanghai								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Shandong Haili Chemical	Zibo								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	PetroChina Jilin Petrochemical	Jieyang								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	North Huajin Chemical	Panjin								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	North Huajin Chemical	Panjin								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Ningbo LG Yongxing Chemical	Ningbo								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Nanhai Maoming	Maoming								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Lihuyi Weiyan Chemical	Dongying								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Liaoning KingFA	Panjin								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Lanzhou Petrochemical	Lanzhou								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Kumho Petrochemical	Jinshan								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Keyuan Petrochemicals/Guangxi Changke	Fangchenggang								
Acrylonitrile-Butadiene-Styrene	Northeast Asia	China	Jilin Petrochemical	Jilin City								

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1. Executive Summary

2. Spotlight

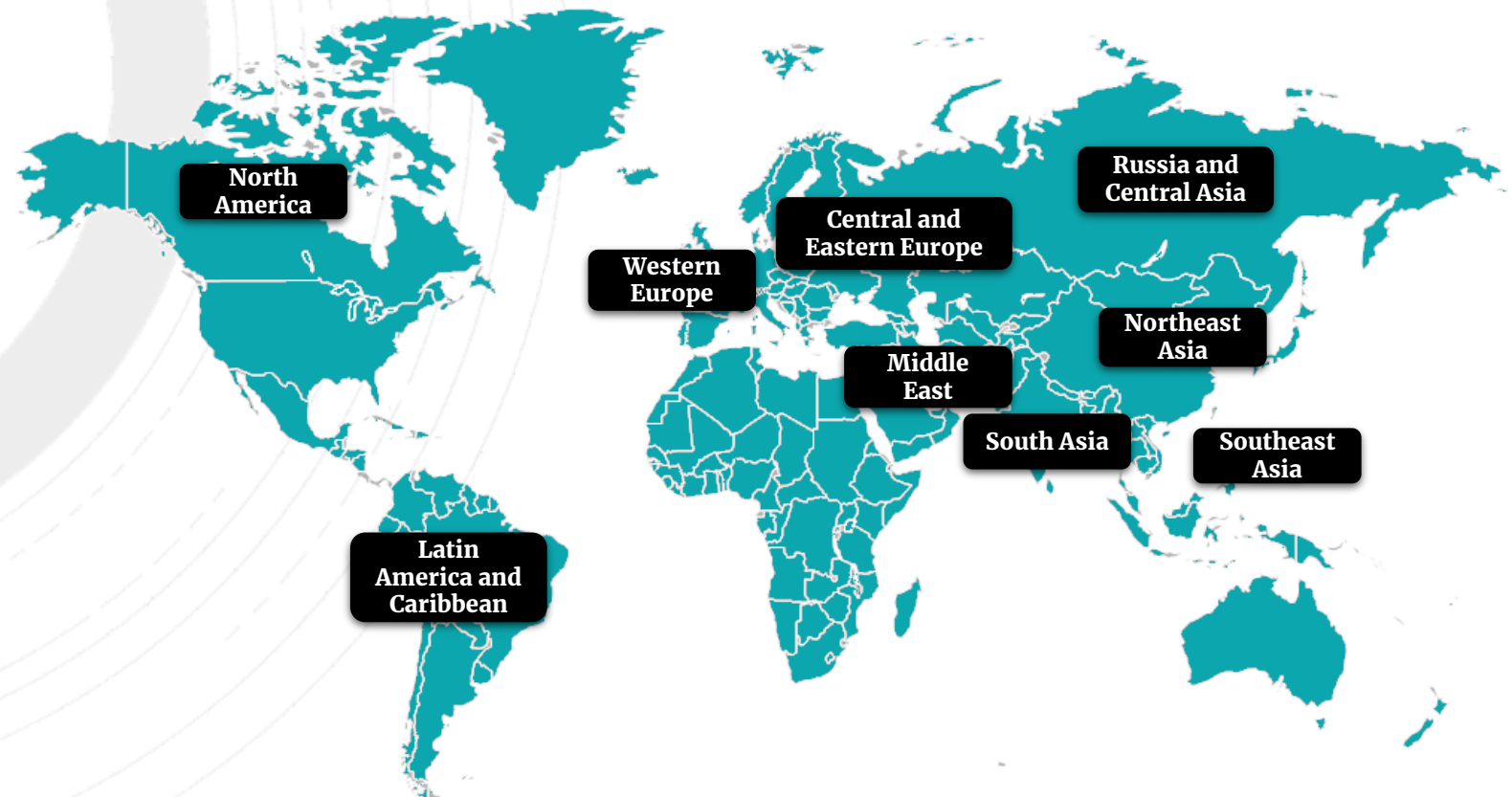
3. Global Supply and Capacity Changes

4. Breakdown of Key Regions

5. Technology

6. Contact us

7. Appendix



Executive summary

How did we get here?

- Producers and consumers across the globe would agree that 2024 was a peculiar year. At the end of 2023 during term negotiations, both anticipated ample supply. Consumers opted to reduce committed volumes in 2024.
- The reality is that demand was slightly better than planned in 2024. More importantly, crackers were running at lower rates and opting for lighter feedslates. There have also been cracker closure announcements in northwest Europe and Japan.
- Large consumers in the three major regions were forced to purchase spot volumes.
- China has still been importing, in spite of the new BD capacity additions.
- High freight rates along the Red Sea and Panama Canal plus longer transit times have resulted in an upheaval of logistics.
- This is why global BD prices were especially volatile, given that large consumers were exposed to the spot market in the face of snug supply.



Executive summary

Where are we headed?



- Butadiene has been and will remain a mere by-product of a cracker. Output is dictated by non-durable polymer demand while BD is heavily dependent on durable good orders.
- The 2023-2033 compound annual growth rate (CAGR) for global ethylene production via a steam cracker is about [redacted] whereas BD production will lag at just under [redacted]. Longer-term olefins production growth could slow on sustainability initiatives.
- Yield factors for crude C4 output from steam crackers have been reduced while co-cracking and hydrogenation were boosted to manage balances, particularly in the last half of the forecast period.
- On paper, Asia-Pacific should become self-sufficient, and imports should disappear. While imports have slowed, the market has been inefficient with the region importing deep sea BD cargoes.
- In Europe chemical giants LyondellBasell, ExxonMobil, Sabic, Dow and BASF have either made cuts or are conducting strategic reviews of assets.
- The US Gulf coast will continue to confront the unpredictability of hurricane threats.

Global: Economy

Central banks appear to have tamed inflation for now. The global GDP forecast continues to be revised lower for longer as China's growth lags.

GDP Forecast Assumptions

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Inflation will be more volatile than before the pandemic. Central banks are likely to keep inflation close to target in the medium and long term.

Monetary Policy

Central banks will cut rates this year. They will move cautiously to bring rates down slowly.

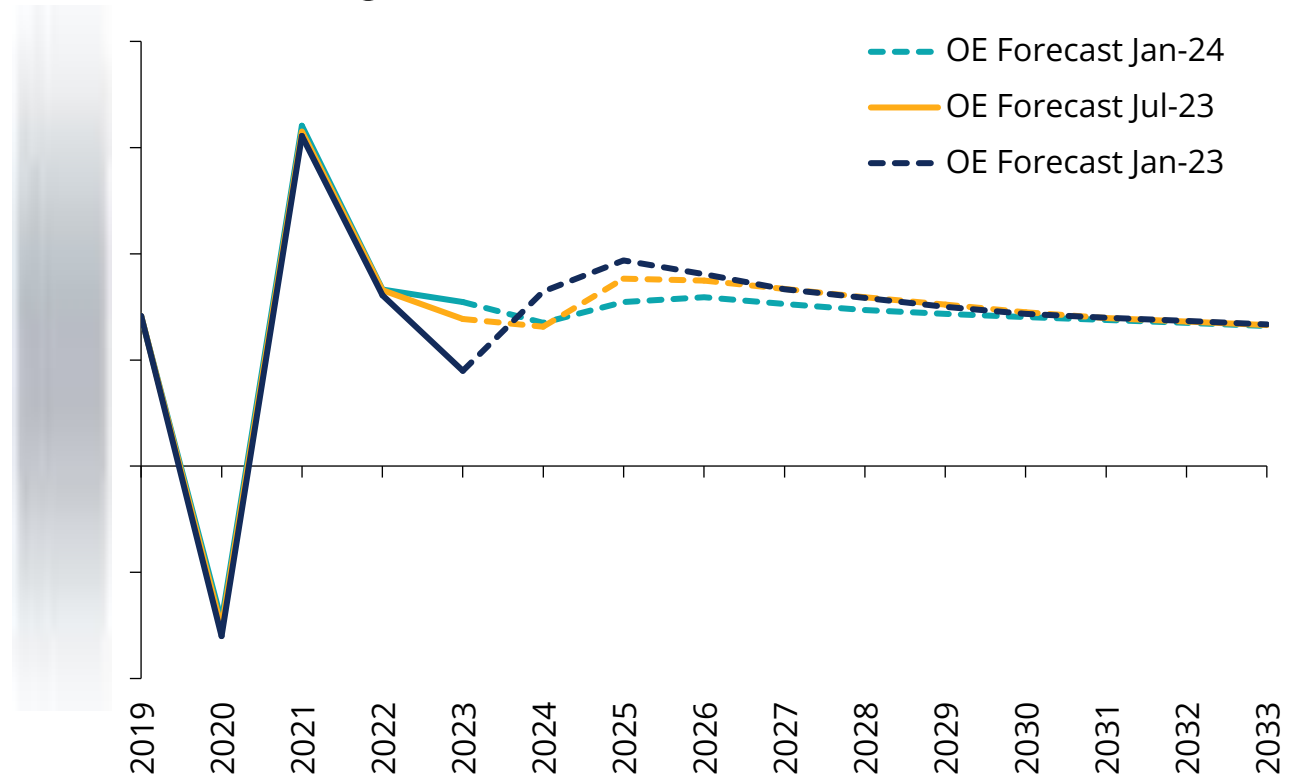
War in Ukraine

Russia sanctions will persist long after any cease-fire. Europe will avoid future energy problems during winter months.

Globalization

No meaningful change in the global trading system or US/China relationship is expected. Recent tariffs and other trade barriers will stay in place.

Global GDP growth rate forecast, Oxford Economics (OE)



China macro factors

Beijing has unveiled recent initiatives to boost consumption.

- In May the IMF raised its projection of China's gross domestic product (GDP) growth to █ in 2024 and █ pc in 2025, because of China's strong first-quarter GDP data and recent policy measures.
- The People's Bank of China to issued new mortgage easing policies on 17 May to support the market. Mega cities like Shanghai, Shenzhen and Guangzhou have announced policies to ease downpayments for homebuyers since then.
- The government's provision of Yn1 trillion of reconstruction special bonds, Yn1 trillion of ultra-long bonds, and Yn1 trillion of refinancing bonds also reflect Beijing's efforts to help debt-ridden local governments.
- Real estate investment dropped by █ pc in April compared with a year earlier. The "real-estate climate index" — which measures the general performance of property sector — dropped to █ in April, continuing to break historic lows, NBS data show.
- Subsidies have been issued for up to ' █ for each car purchase and ' █ mn of consumption coupons to travelers.
- The IMF expects China's GDP growth to slow to █ pc by 2029 because of an aging population and slower productivity growth.



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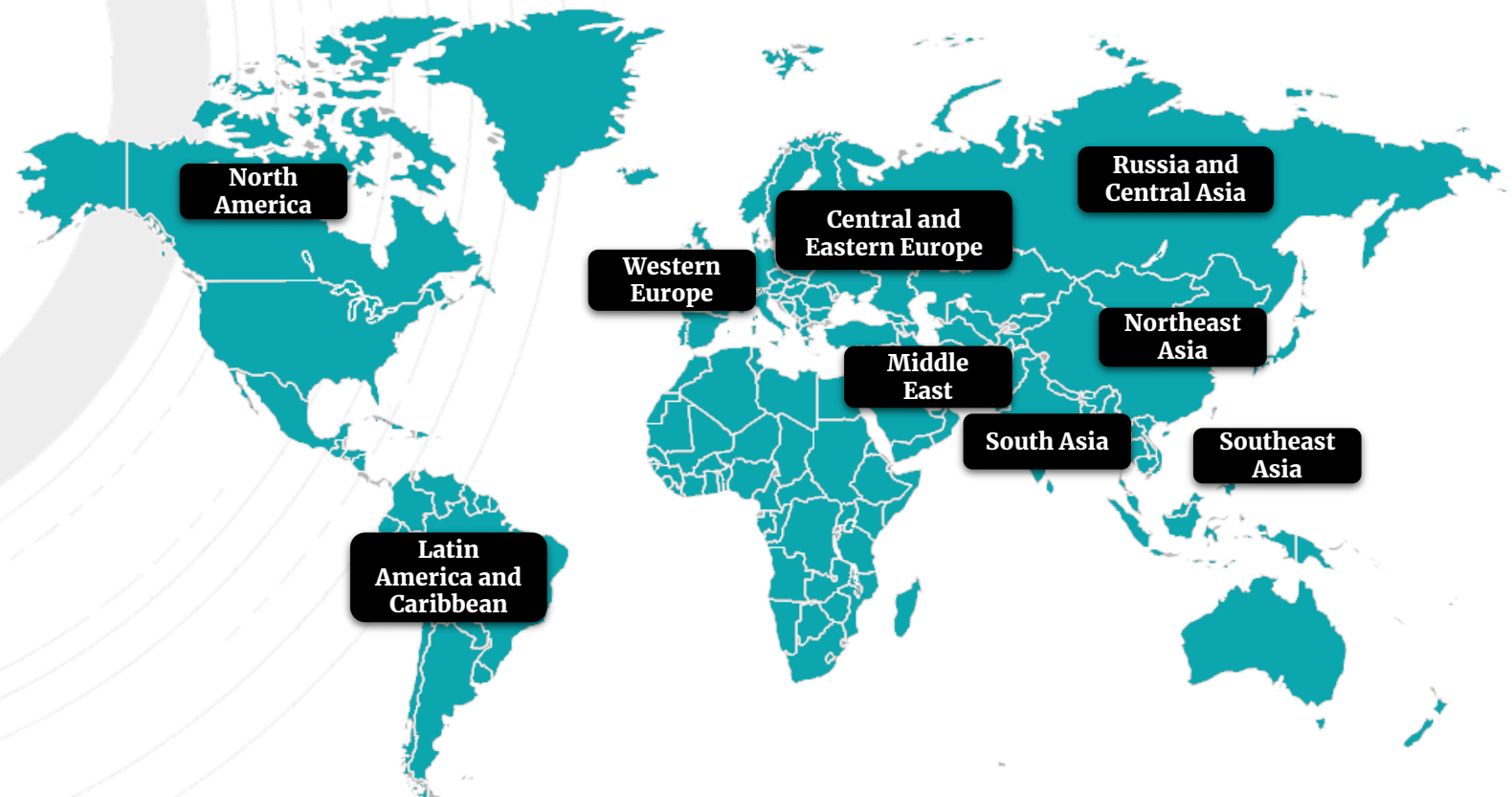
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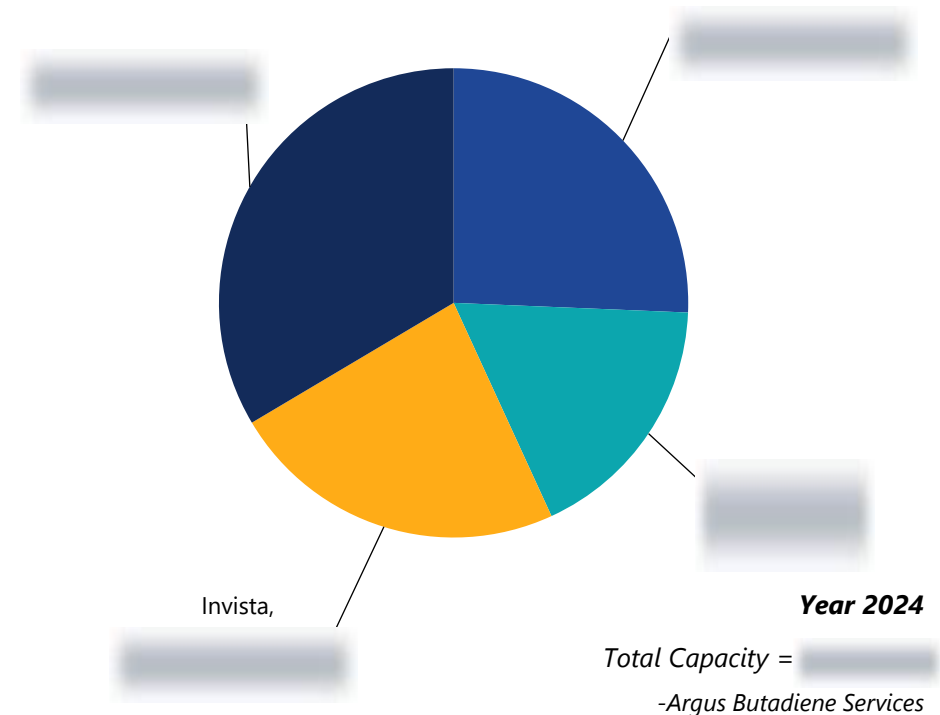


Adiponitrile

The Crude C4-derived ADN market rebalances itself.

- The adiponitrile segment, like the rest of the BD market, has had a dynamic 2024 to date. The jumping point was when Invista in October 2023 permanently shut its [REDACTED] t/yr facility in [REDACTED]. The company cited “lower-than-anticipated growth and an increase in global supply.”
- In turn European ADN production in the first half of 2024 jumped to cover for planned turnarounds in both the US and China, plus global rebalancing.
- Estimated operating rates for France’s Butachimie escalated to the high [REDACTED] range in the first half of 2024, from [REDACTED]: since the Russia-Ukraine conflict.
- Dutch TTF natural gas prices on a day ahead basis have eased, according to *Argus* data. From January to June 2024 prices averaged € [REDACTED] MWh from July to December 2023 and € [REDACTED] MWh from the same period a year earlier. This has alleviated some of the margin pressures on French ADN production.

Global adiponitrile capacity based on butadiene feedstock 000't



*Butachimie is a joint venture between Invista and BASF

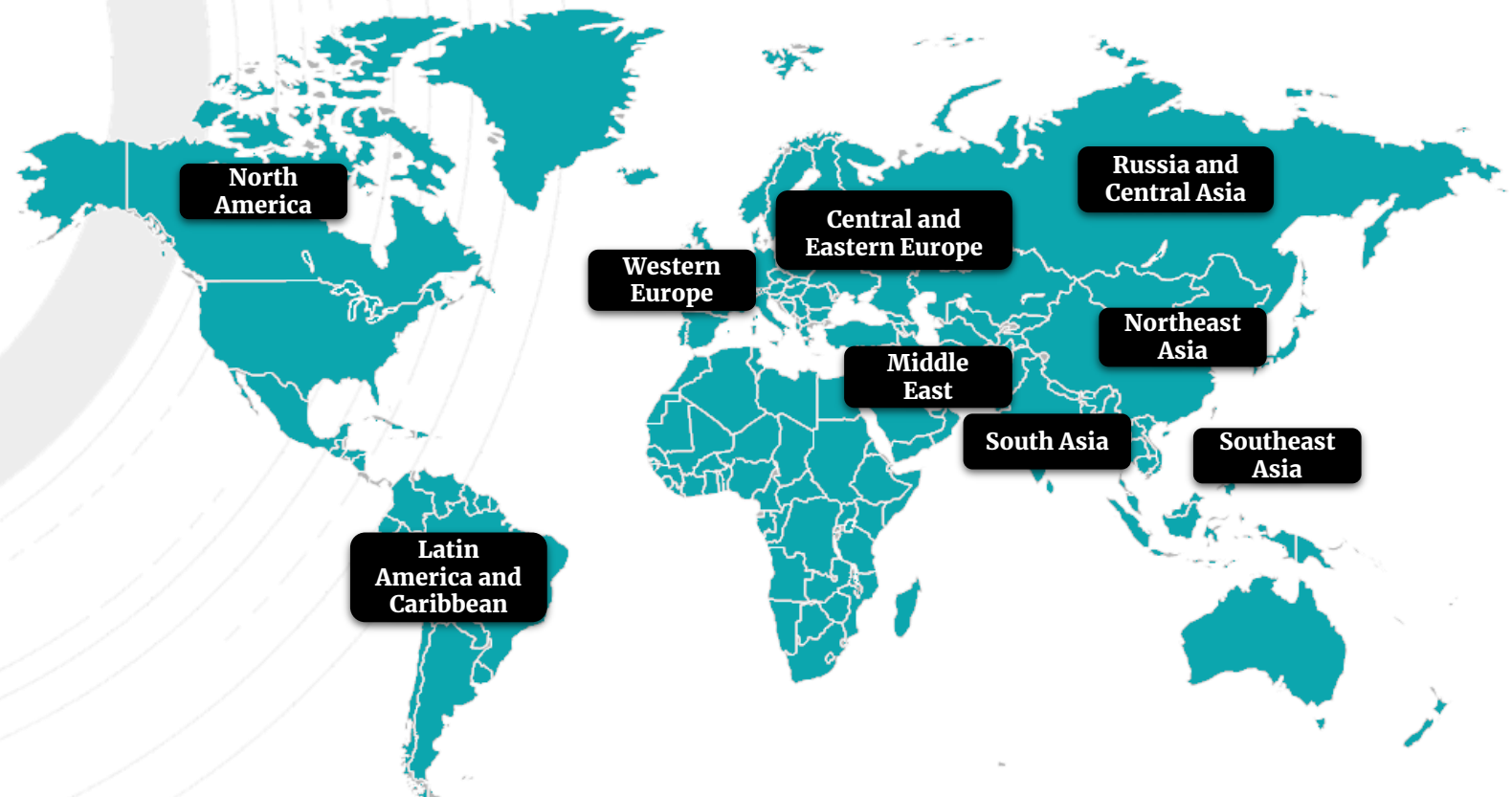
Water restrictions in Mexico

- The Mexican state of Tamaulipas and the federal interior ministry enforced water restrictions because of an ongoing severe drought. This has slowed or even stopped operations in the port cities of Tampico, Madero, and petrochemical hub Altamira in May and June 2024.

- [Redacted]
- [Redacted]
- [Redacted]
- [Redacted]

Company Name	Affected Capacity (000't)			Derivatives		
SABIC						
INSA						
INEOS Styrolution						
Dynasol Elastomers						

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China

- The CAGR for 2023-2033 for BD capacity will expand by 7%pc with derivative capacity at 10%pc.

US

- Prolonged ethane cracking since 2020 and into the second quarter, coupled with supply constraints, supported higher BD prices.

Western Europe

- Two crackers will shut by the end of 2024: 1. **Arco** northern France and 2. **Chore**.

Central and eastern Europe

- There could be a risk to a new BD unit in the region, depending on whether a cracker project proceeds as planned.

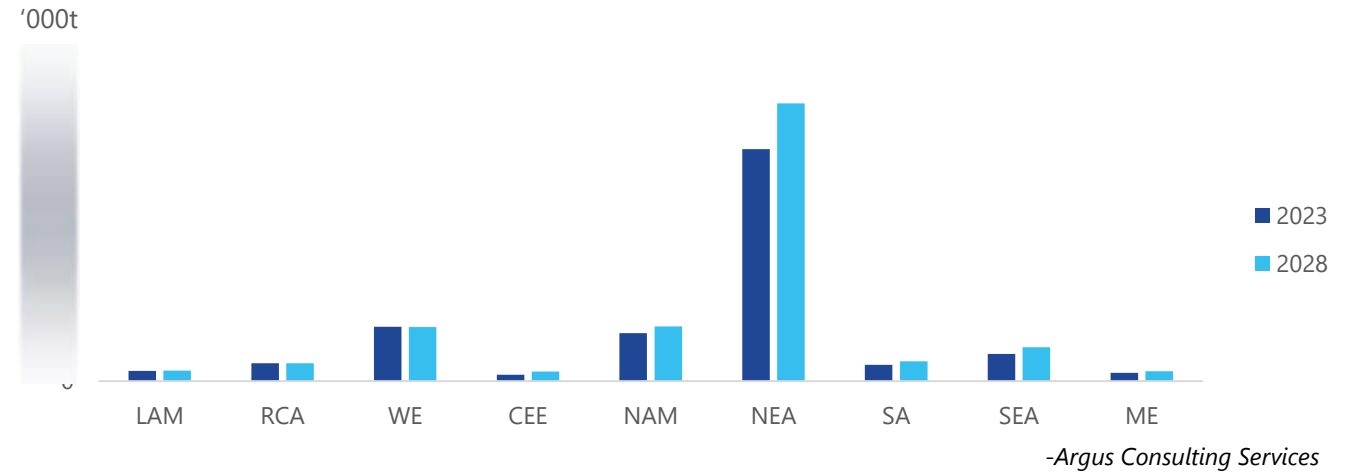
Russia

- We are projecting flat long-term for both BD production and consumption given geopolitical uncertainties.

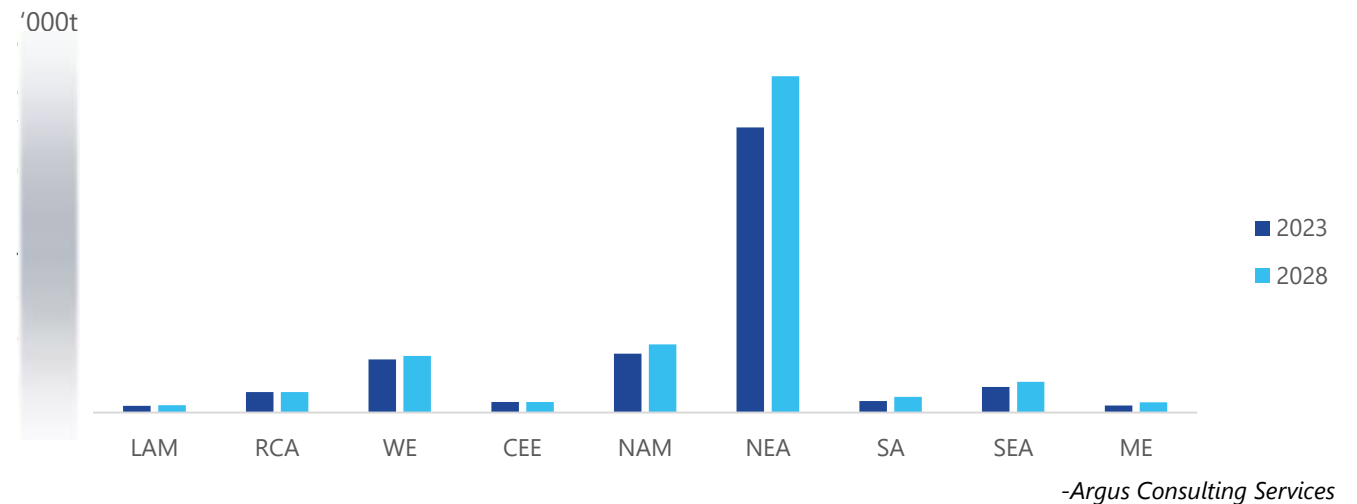
Southeast Asia

- Technical issues at units in Malaysia, the Philippines and Vietnam have resulted in less BD output but an uptick in crude C4 exports.

Regional Butadiene production



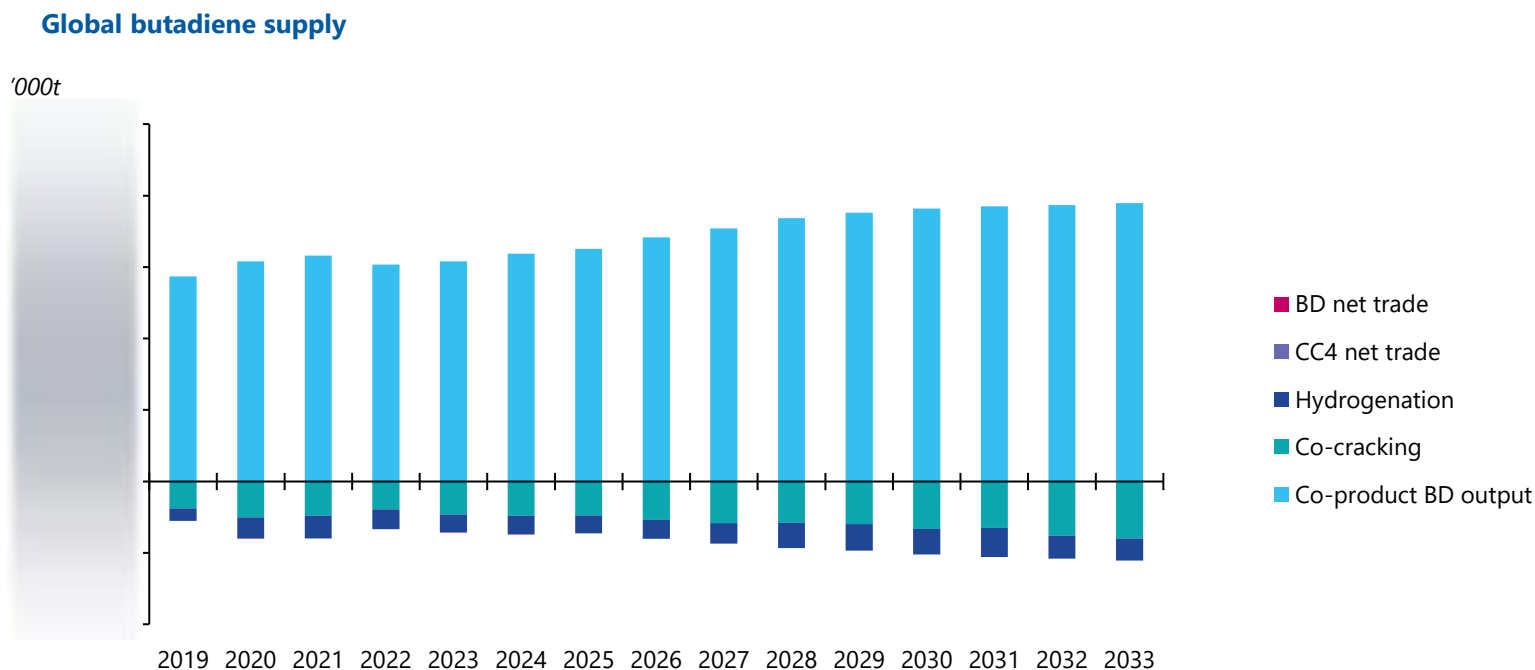
Regional Butadiene demand



World butadiene industry overview, 2019–2033

A majority of the growth is slated for the first half of the forecast period.

- Production growth from 2023-2033 will reach **1.5 mtpa** with most of the development concentrated in 2023-2028 at **1.1 mtpa**.
- China's BD output will soar to **1.1 mtpa** from 2023 to 2028.
- Major risks to BD production include lighter feedstocks, reduced cracker operating rates and lower polymer demand as sustainability efforts increase.
- Producers who have the option to co-crack and hydrogenate will use these processes to achieve a market balance.
- A less likely threat is that durable demand will outpace nondurable orders.



-Argus Consulting Services

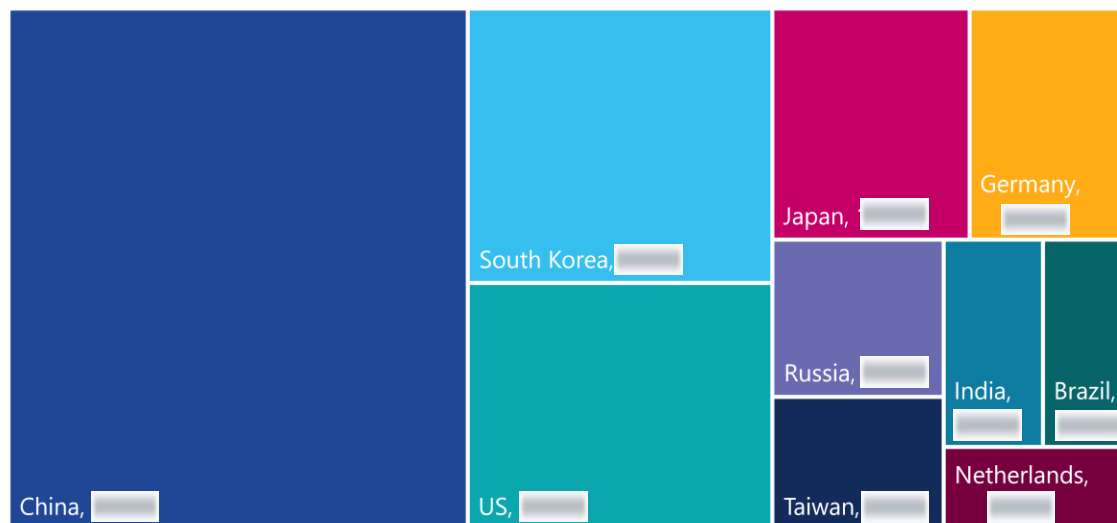
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Top 10 Countries – Butadiene Production Capacity, 2023

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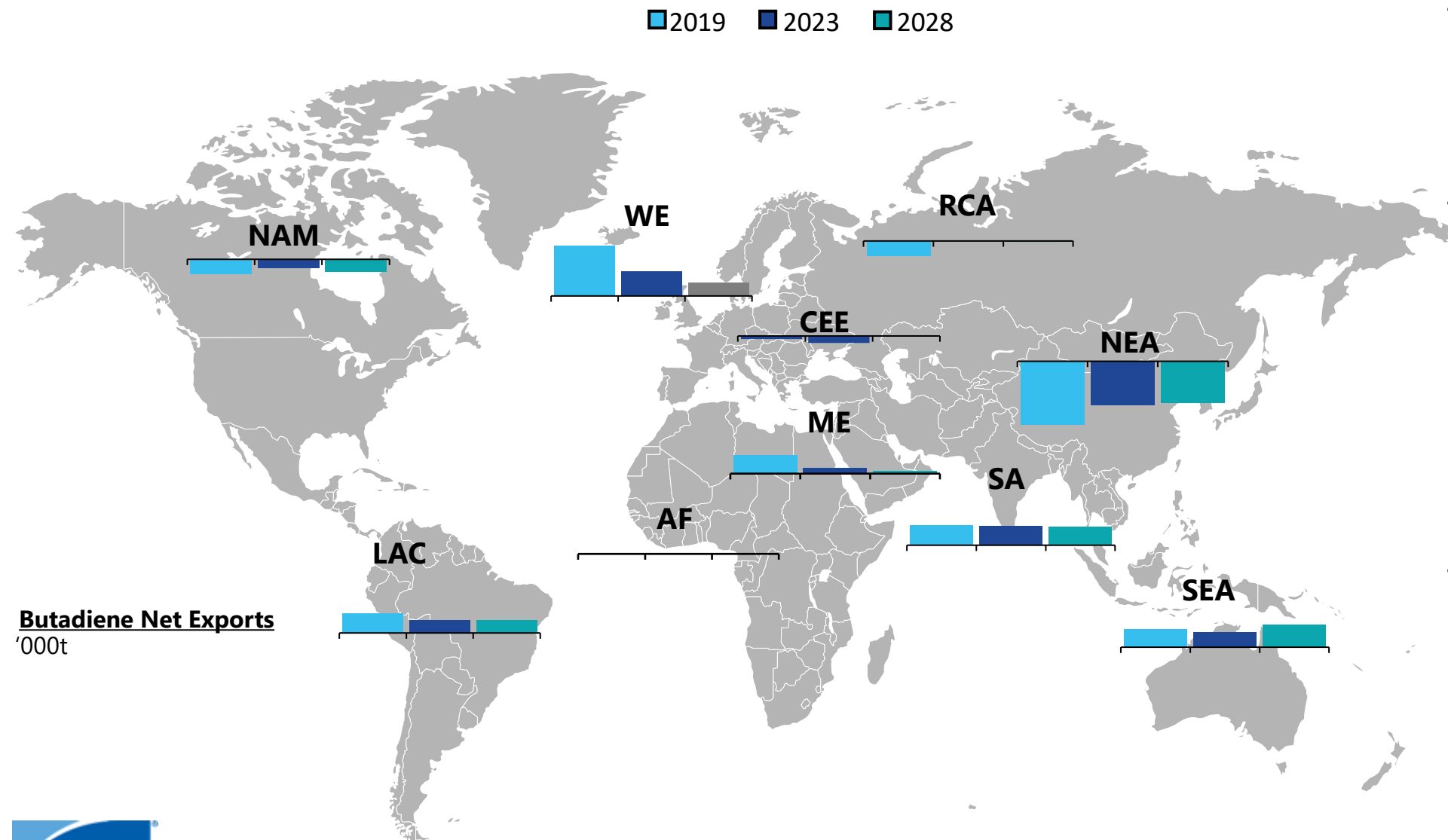


Top 10 Countries – Butadiene Consumption Capacity, 2023

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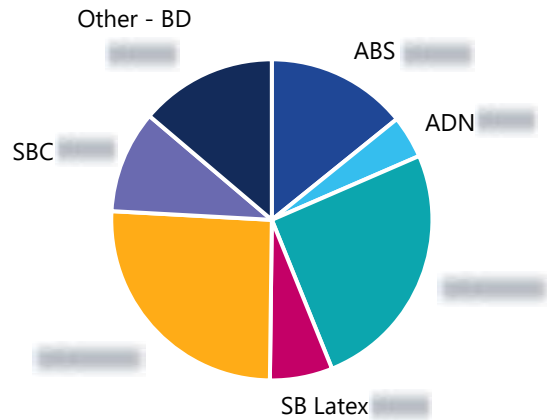


Butadiene trade



World butadiene industry overview

Global butadiene demand 2023

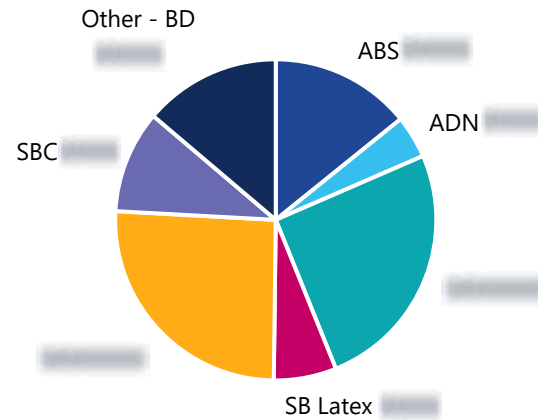


Year 2023

Total demand = 1.2 mn t

-Argus Consulting Services

Global butadiene demand 2028



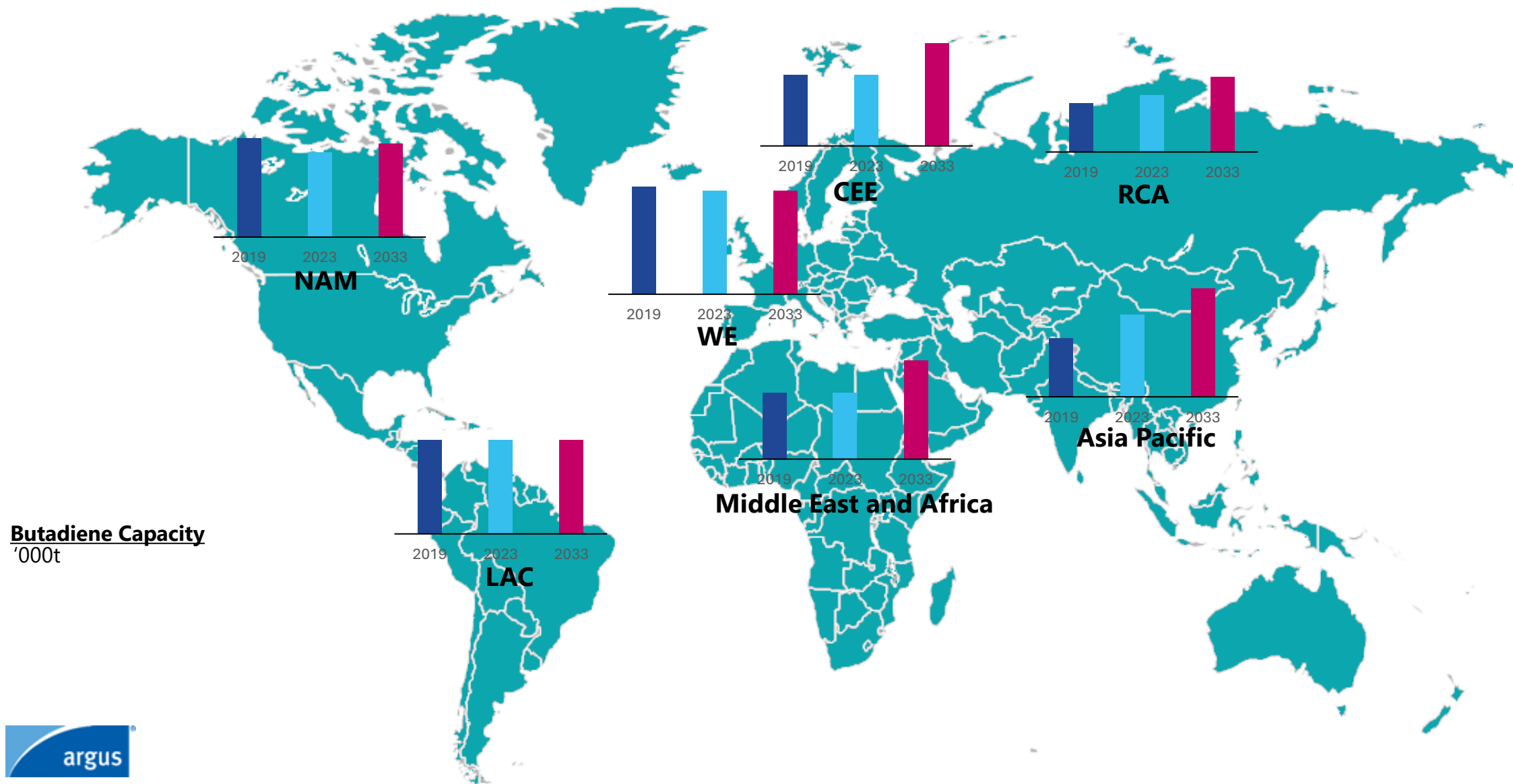
Year 2028

Total demand = 1.2 mn t

-Argus Consulting Services

- World butadiene production is projected to grow 1.2 pc from 2023 to 2028 but stabilize between 2028 to 2033. The slowdown is attributed to sustainability efforts and moderate economic growth throughout the end of the forecast period.
- High interest rates have kept western buyers away from purchasing durable goods and new homes. This is why demand is slated to grow 1.2 pc from 2023 to 2028.
- Passage through the Panama Canal has improved since the start of this year, but Red Sea conditions remain highly volatile with no signs of improvement.

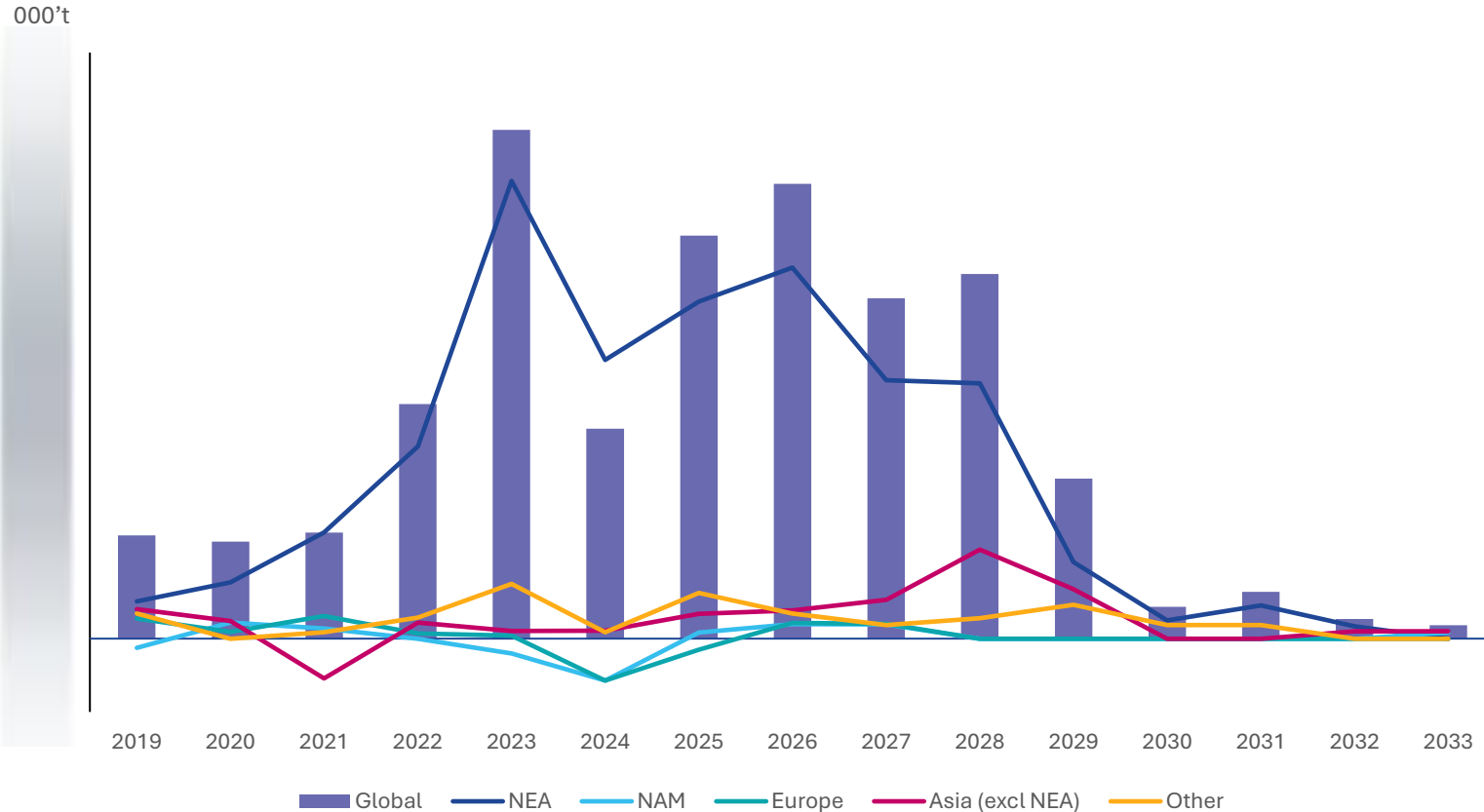
Butadiene capacity expansions



Derivative capacity additions

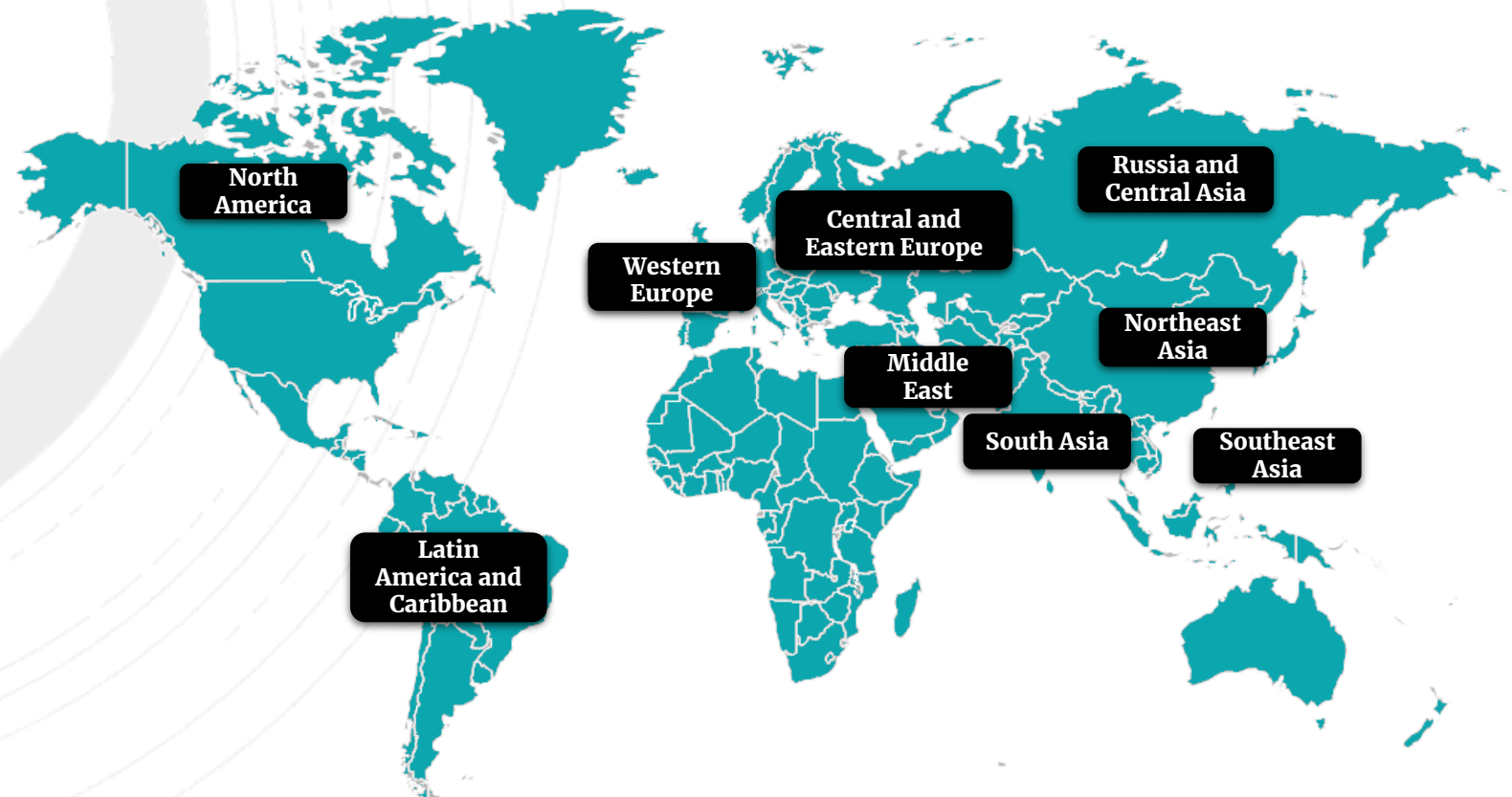
The ABS and SBC segments will lead the way.

Global Butadiene consumption capacity additions / shutdowns



- The bulk of derivative expansions are in Asia-Pacific, namely China.
- Acrylonitrile butadiene styrene, styrene block copolymer and solution styrene butadiene rubber will have the large growth. Newer, efficient units are expected to drive more mature assets to reduce rates or even permanently idle.
- During peak covid, demand nitrile rubber latex for medical gloves exploded. Since then, demand has normalized.

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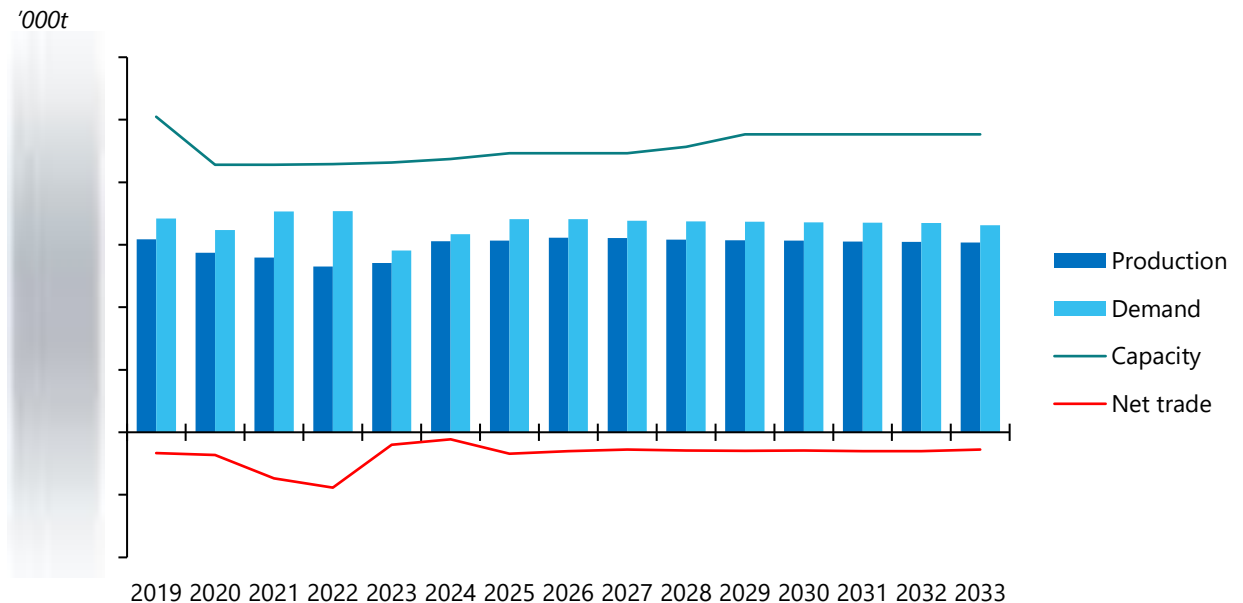
North America butadiene summary

Ethane cracking continues to dominate.



- New cracker capacity has slowed as North America's export role continues to grow.
- Cracker operating rates will run in the high '80s in 2029 and beyond.
- By 2031, high operating rates and a sustained ethane cost advantage will likely lead to at least one additional cracker project.

North America butadiene supply and demand



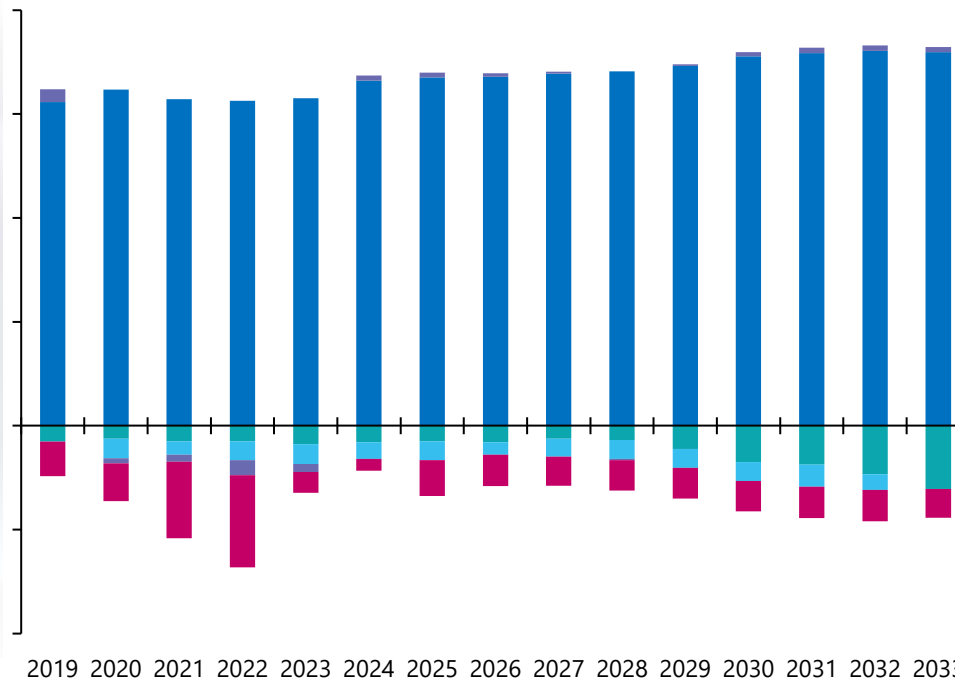
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North America supply, 2019–2033

TPC is slated to expand in 2024.

North America butadiene supply

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- BD net trade
- CC4 net trade
- Hydrogenation
- Co-cracking
- Co-product BD output

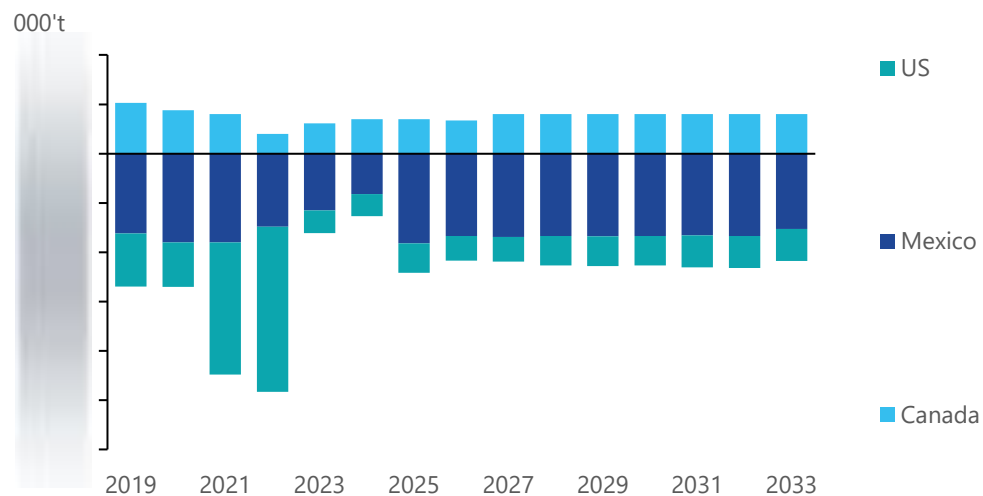
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North America demand, 2019–2033

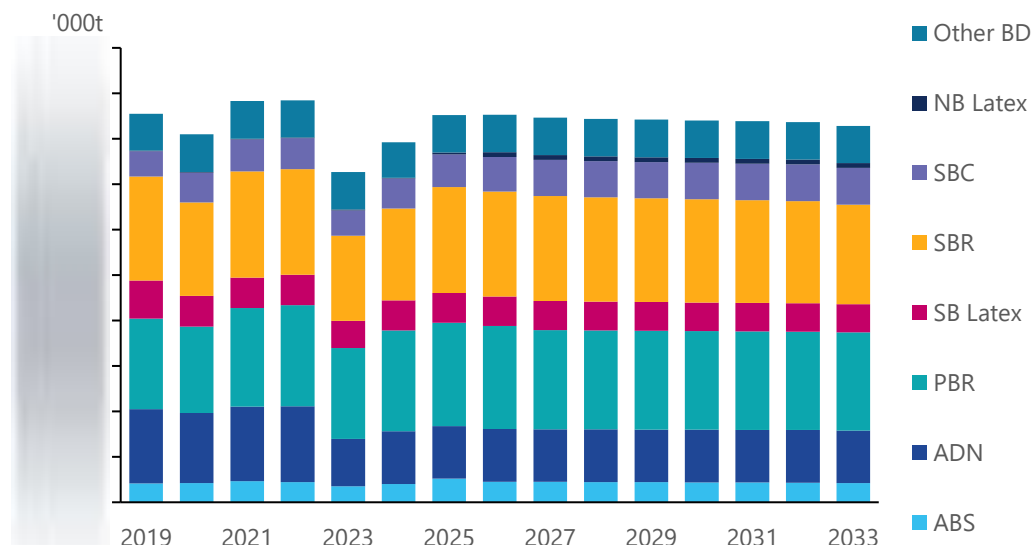
The US will move closer to a balanced state.

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North America butadiene net exports



North America butadiene demand

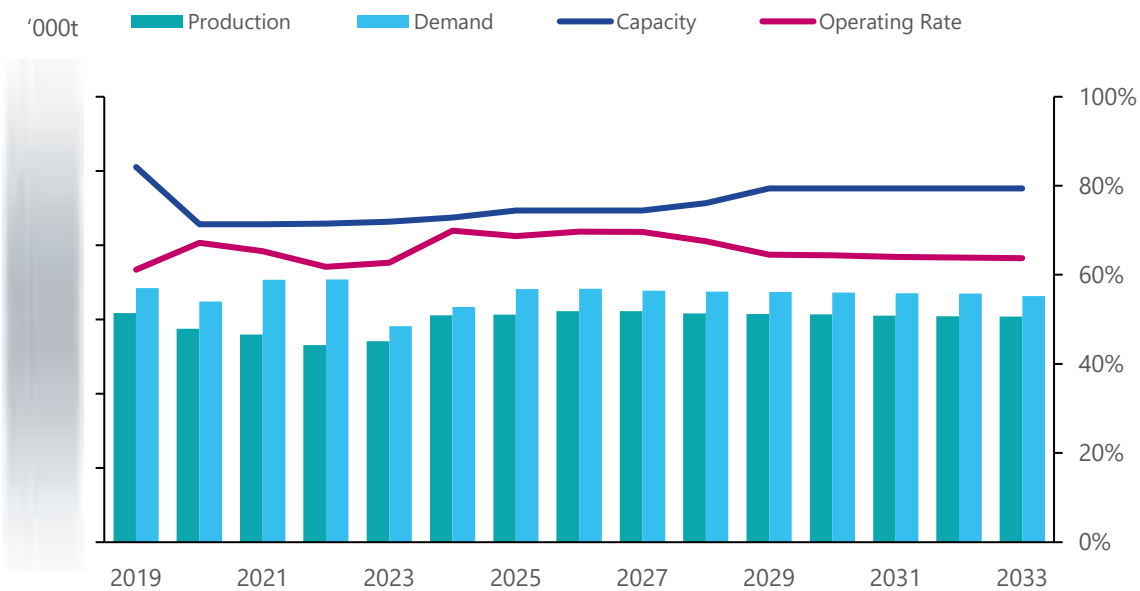


North America demand projects, 2019-2033

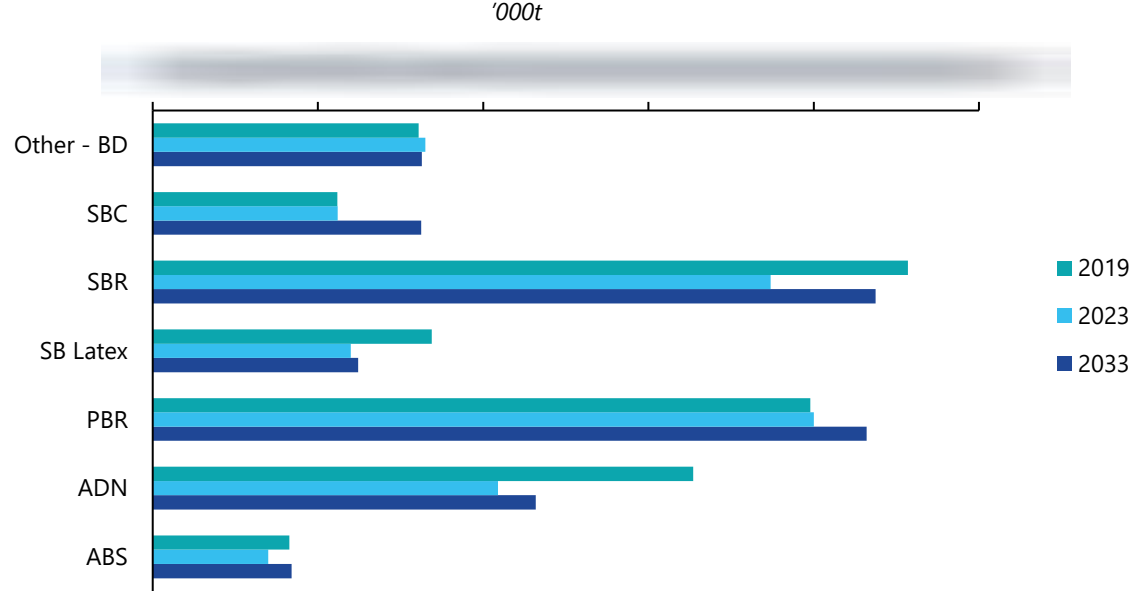
The region will see some derivative expansions in the coming years.



North America butadiene supply / demand



North America butadiene demand by derivative



We hope you found this sample report for Argus Butadiene Analytics valuable.

The Argus Butadiene Analytics service is for anyone engaged in the butadiene market and seeking insight into the fundamentals driving key trends, including global supply, demand growth, trade, operating rates, etc.

If you want to learn more about becoming an Argus subscriber and receiving full PDF reports complete with accompanying Excel data files twice a year, click below:

> Find out more

Contact us



Angie Joe
Vice President Global Butadiene and Derivatives

Angie leads the crude C4, butadiene and derivatives consulting practice at Argus. She spearheads the creation and production of the butadiene newsletter, monthly outlook and long-term supply and demand analytics publications. Angie has more than 15 years' experience in the petrochemical industry, including roles as an analyst and broker, and in business development and communications. She also has expertise in styrenics, aromatics, olefins and methanol. Angie enjoys tapping her experience along the entire petrochemical value chain to piece together market information in a global context.



Akash Chavanke
Business Analyst - Chemicals

Akash is involved in improving the granularity of integrated aromatics and olefins derivative markets. He previously spent one and half years at Prismane Consulting in Pune, where he worked on projects related to specialty polymers, bulk polymers, petrochemicals, bio-plastics and inorganic chemicals. Akash holds a B.Tech degree in Petrochemical Engineering from Maharashtra Institute of Technology, Pune.



Brian Leonal
Editor – Chemicals Asia

Brian Leonal is the Asia Pacific editor of Argus' petrochemicals desk. He has nine years of experience in the hydrocarbon industry. Before joining Argus for the second time, he was a corporate banker in DBS Bank covering oil and gas as well as petrochemical markets. He has been involved in a diversity of transactions, including asset-backed, project, trade, and M&A financing, as well as clean corporate loans. He started his career in Argus in 2015 as part of the petrochemical team, with exposures to olefins, aromatics, and polymers.

Argus acronyms

- Aa – Australasia
- AFR – Africa
- ARA – Amsterdam Rotterdam Antwerp
- b/d – barrels per day
- bl – barrel
- bn – billion
- Btu – British thermal unit
- CAGR – Compound annual growth rate
- CEE – Central and Eastern Europe
- CTO/CTP – Coal to olefins/Coal to propylene
- DME – Dimethyl Ether
- DMT – Dimethyl terephthalate
- EIA – Energy Information Administration
- EPA – US Environmental Protection Agency
- ETBE – Ethyl tertiary butyl ether
- HAc – Acetic acid
- HCHO – Formaldehyde
- INO – Indonesia
- kl – Kiloliter
- LAC – Latin America and Caribbean
- LPG – Liquid petroleum gas
- ME – Middle East
- MDF – Medium density fiberboard
- MDI – Methylene diphenyl diisocyanate
- MEA – Methylamines
- MeOH – Butadiene
- MMA – Methyl methacrylate
- mn – million
- MTBE – Methyl tert-butyl ether
- MTO/MTP – Butadiene to olefins/Butadiene to propylene
- NAM – North America
- NEA – Northeast Asia
- NZE – New Zealand
- OSB – Oriented strand board
- PET – Polyethylene terephthalate
- POM – Polyoxymethylene
- PBT – Polyethylene butyl terephthalate
- pc – percent
- RCA – Russia and Central Asia
- RFS – Renewable Fuels Standard
- ROW – Rest of world
- SEA – Southeast Asia
- SA – South Asia
- t – metric ton
- t/yr – metric tons per year
- TAME – Tertiary amyl methyl ether
- VAM – Vinyl acetate monomer
- WE – Western Europe
- yr – year
- eSBR – Emulsion Styrene Butadiene Rubber
- sSBR – Solution Styrene Butadiene Rubber

Argus Butadiene and Derivative services

Argus experts combine decades of experience and insight in analyzing the global markets for butadiene, from the upstream wellhead, via refineries and steam crackers, to downstream products such as synthetic rubber.

An Argus market service

Weekly Butadiene Report

- Ongoing commercial analysis of events and trends
- Current contract and spot pricing for key markets

Monthly Market Outlook

- 24-month rolling price forecast for all major regions

Butadiene Analytics

- 5-year history, 10-year forward global butadiene supply/demand
- Trade capacity data forecast
- Quarterly updates addressing key industry trends
- Argus analyst access provides customers with tailored support

Audience

- Anyone associated with the global butadiene industry, including producers, consumers, end users, traders, shippers and investors

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