


Anionic surfactants

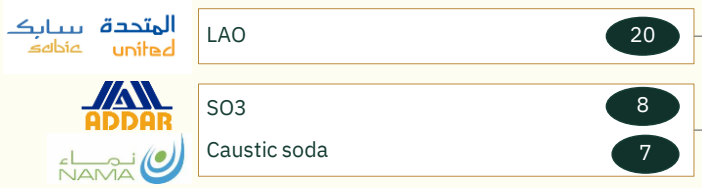
Anionic surfactants

	Product	Non captive volume, KTA	Total volume, KTA	Location	Key Driver
Key metrics 	Alpha olefine sulfonate	30	30	Yanbu	KSA demand growth for anionic surfactants is expected to be driven by consumer sector
	Total volume	30	30		

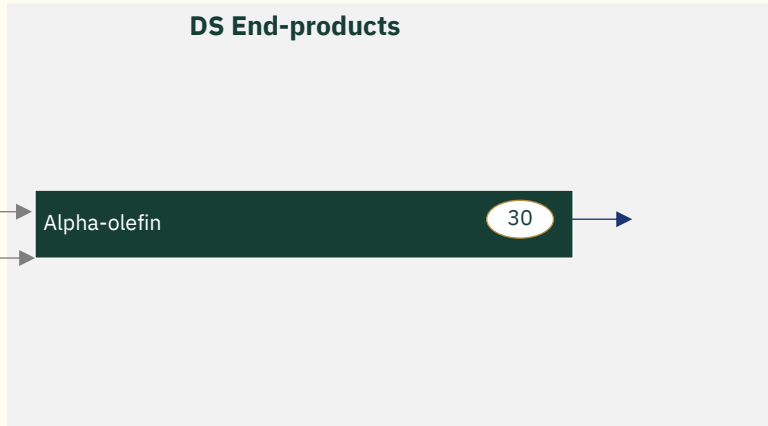
Value chain



Raw Materials



DS End-products



Integrated case
x Raw Materials
 end products
→ Sold to market
 xx Captive capacity
 xx Non-captive capacity

Exemplary players

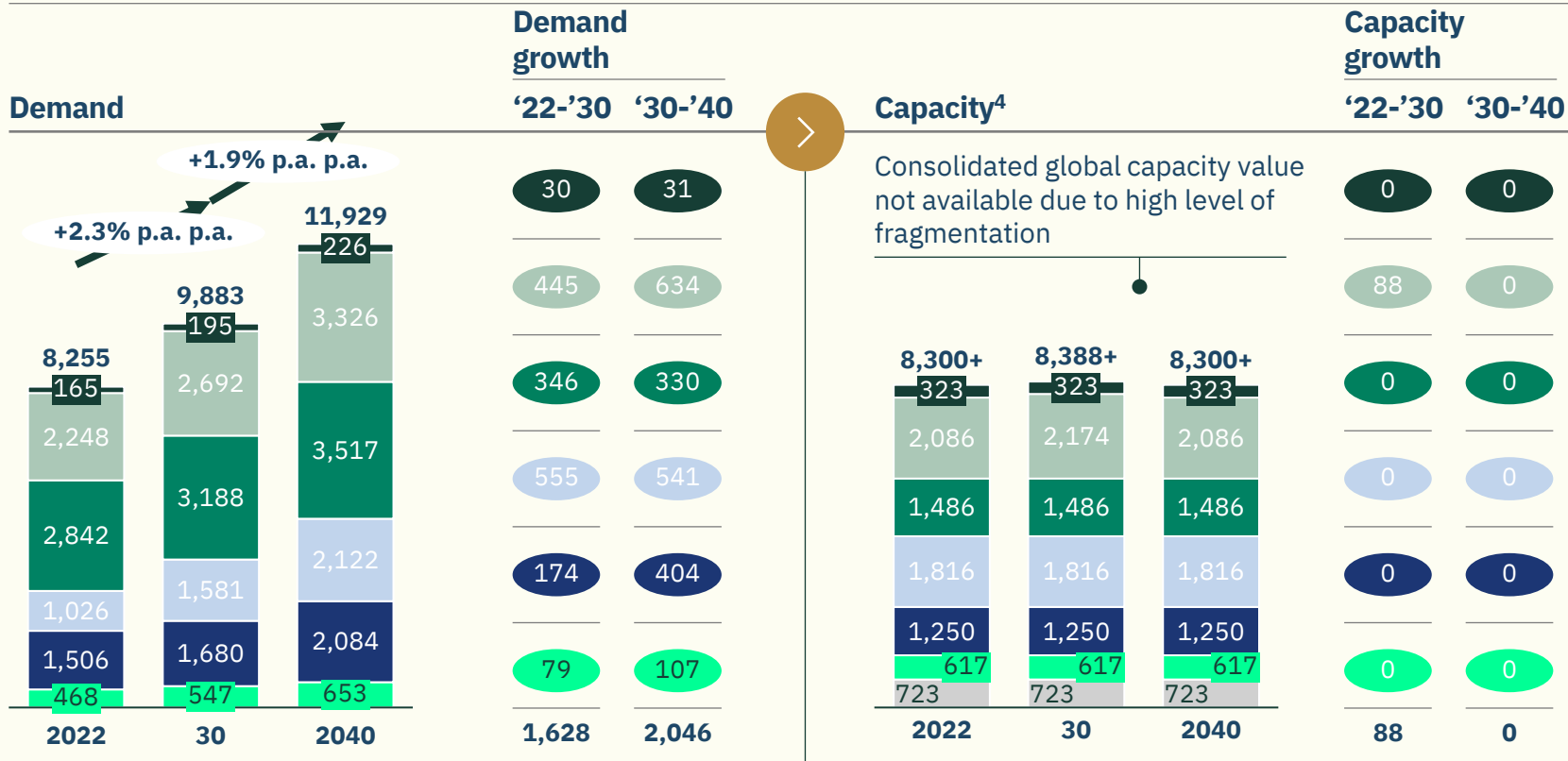


Global demand for anionic surfactants is expected to grow faster than capacity in 2022 - 2040

NOT EXHAUSTIVE



Global anionic surfactants demand / capacity, KTA



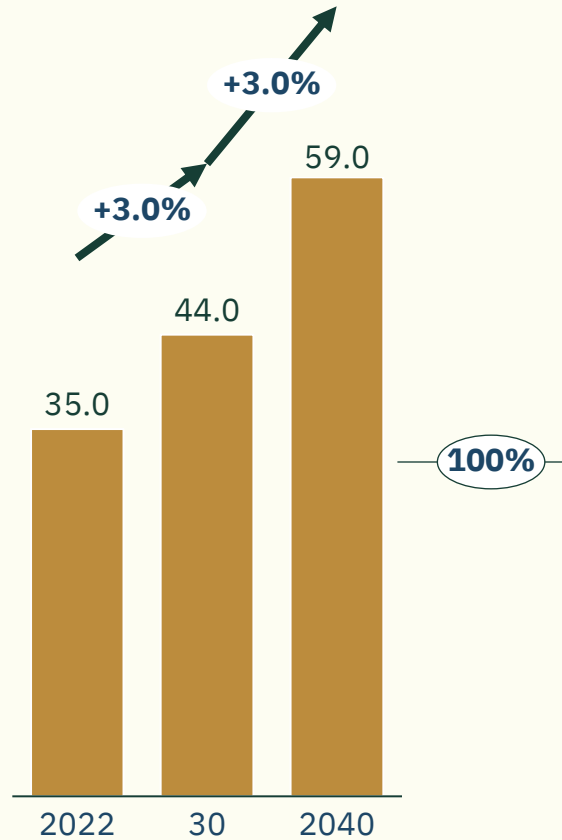
Key takeaways

- Addressable demand³ for anionic surfactants by 2030 is ~**1,628 KTA**, coming from:
 - Middle East 30 KTA (target region)
 - Asia 357 KTA
 - Europe 346 KTA
 - China 555 KTA
 - North America 174 KTA
 - RoW 79 KTA
- Due to high level of fragmentation, global installed capacity value is not publicly available
- Additional gap of ~2,046 KTA by 2040** expected considering projected growth

1. Includes Iran, Israel, Kuwait, Oman, Qatar, KSA, Syria, UAE, Turkey | 2. Excluding China | 3. Calculated as demand growth – capacity growth if demand growth > capacity growth, otherwise 0 (except for Middle East, where KSA growth can always be captured) | 4. Global capacity assumed knowing that market is balanced

KSA demand growth for anionic surfactants is expected to be driven by consumer sector

KSA anionic surfactants demand projection, KTA



Demand drivers

End market (application)	Demand outlook, KTA	CAGR '22-'30, %	CAGR '30-'40, %
Consumer (home and industrial detergents)	35.0, 44.0, 59.0	3%	3%

xx% Share of demand covered by the application¹, %

100%

Key takeaways

KSA represents <1% of global demand and expected to grow at **3.0% CAGR by 2030**

Afterwards the growth will be maintained until 2040

Key drivers of growth in KSA is:

- **Consumer sector** with a 3% CAGR between 2022-30

KSA demand is expected to grow in line with global (~3.0% KSA vs. 3.3% global CAGR '22-'30)

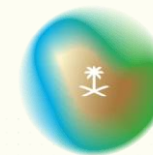
Size of the local market makes LAB an export-oriented investment case

1. Middle East share

Source: Internal analysis

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ENERGY HAS ITS HOME

وزارة الطاقة
MINISTRY OF ENERGY



Thank You