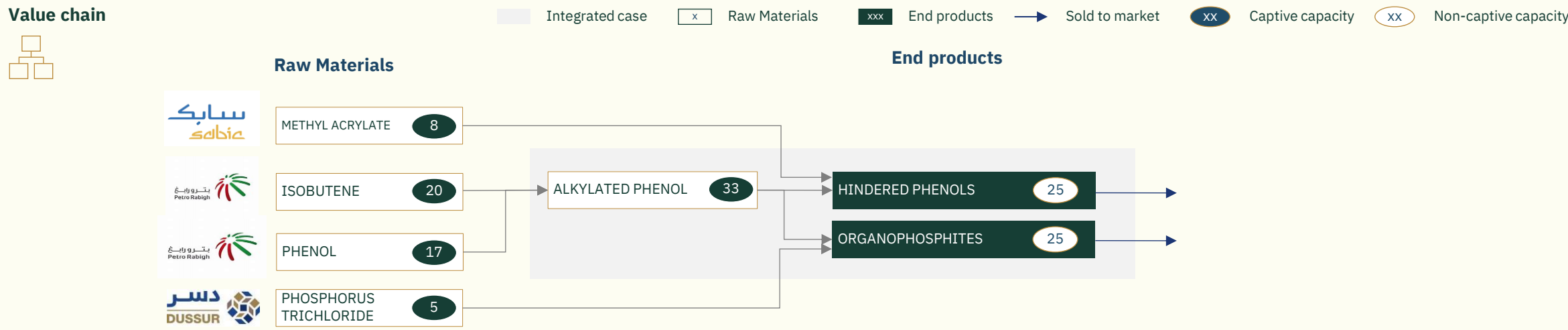


Antioxidants

Antioxidants-HINDERED PHENOLS & Organophosphates

Product	Non captive volume, KTA	Total volume, KTA	Location	Full potential market growth
Key metrics				
ORGANOPHOSPHITES	25	25	Jubail	The Demand is expected to grow by~8% in KSA and ~4% in ME, CAGR '22-30, driven by polymer production growth, +10 KTA potential in Europe and Asia
ALKYLATED PHENOL	0	18		
METHYL ACRYLATE	0	8		
Total volume	25	51		

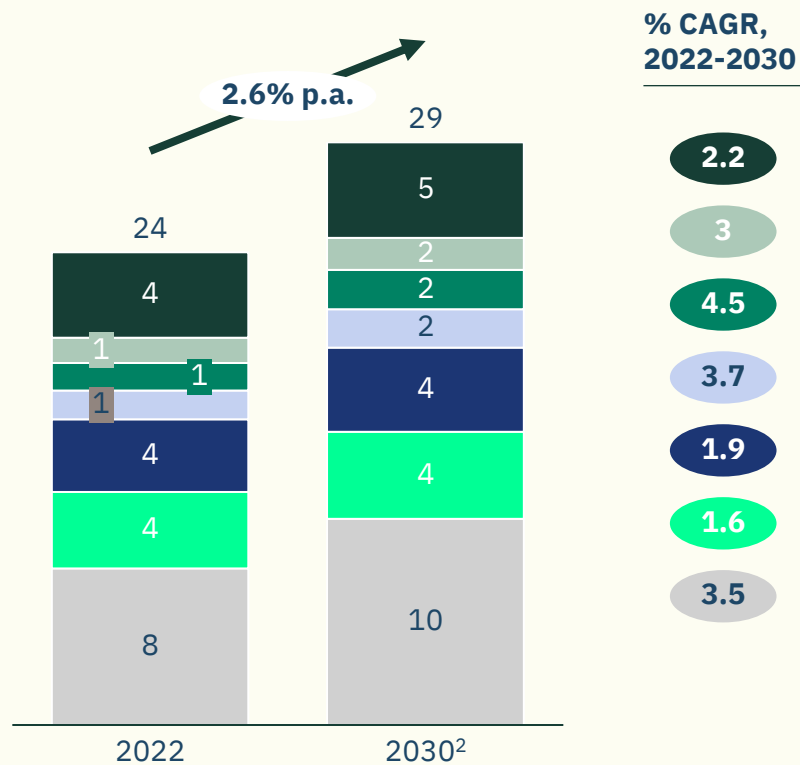


Exemplary players

A. Plastics additives market is to grow at 2.6% p.a., with flame retardants representing ~33% of the market by 2030

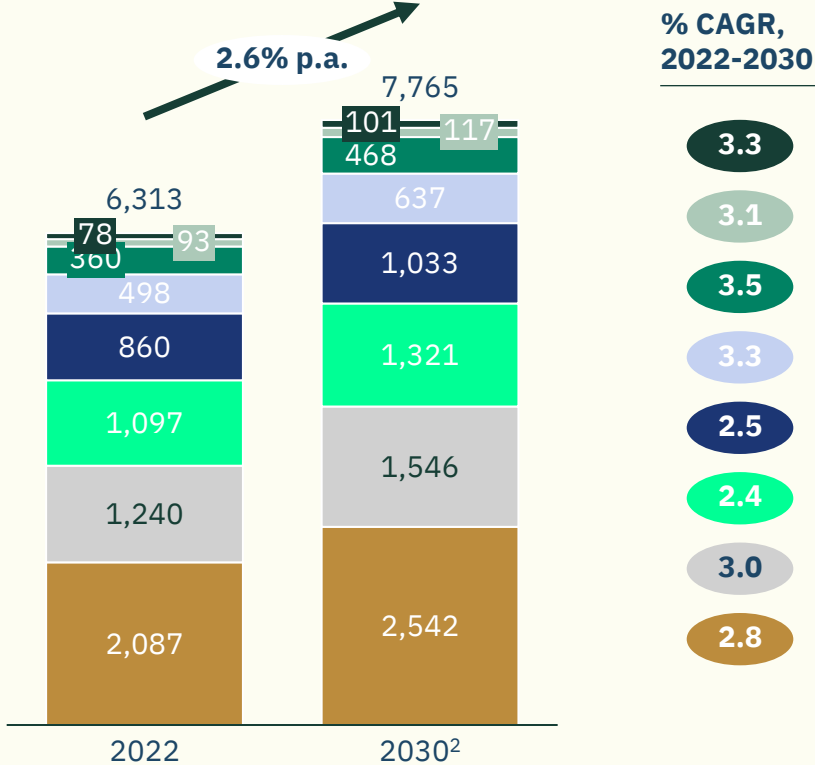
Plastics additives demand by region, USD Bn¹

- Mainland China
- Western Europe
- North America
- Southeast Asia
- India
- Middle east
- Other



Plastics additives demand by sub-segment, KTA

- Flame retardants
- Heat stabilizers
- Impact modifiers
- Lubricants
- Antioxidants
- Chemical blowing agents
- Antistatic agents
- Light stabilizers



Key Insights

Global demand growth for plastics additives is mainly driven by major Asian countries with India, Mainland China, and Southeast Asia having 4.5%, 3.5%, and 3.7% CAGRs respectively

Mainland China is by far the biggest consumer of plastics additives; representing ~37% of the global demand, which is a result of China's high resins production and fabrication

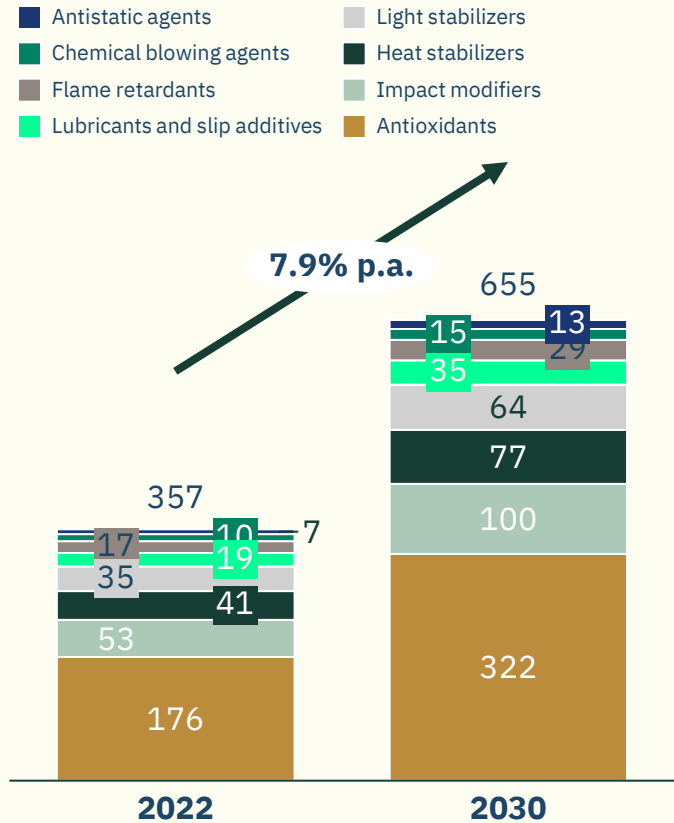
Flame retardants is the largest sub-segment in plastic additives, due to their typical high concentration and application in high demand sectors such as construction and automotives

1. Assumed at current market price
 2. Based on region and segment CAGR 2020-2025 assumption, extrapolated to 2030

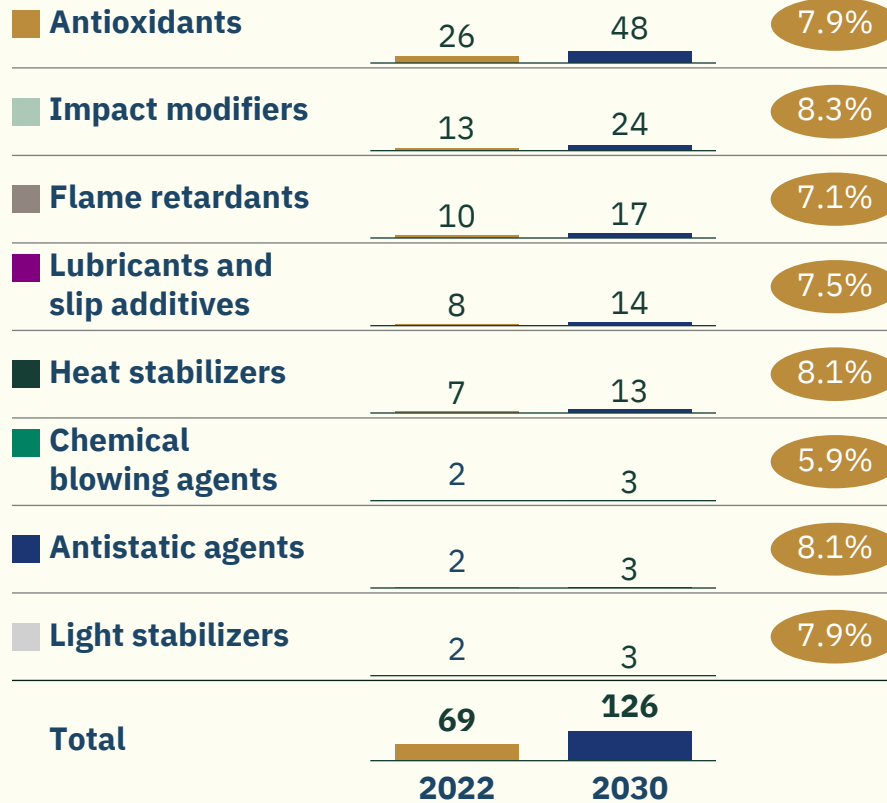
B. KSA’s plastic additives market is estimated at USD ~360 Mn with ~8% p.a. growth, driven mainly by the expected increase of polymers production

X% Volume CAGR, 2022-2030 2022 2030

KSA consumption of chemical plastic additives, USD Mn¹



KSA consumption of chemical plastic additives, KTA



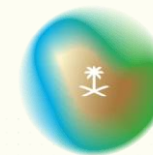
Key insights

- **Antioxidant is the highest consumed type of plastic additives in KSA**, due to KSA’s high production of polyolefins; **Impact modifiers and Flame retardants follow** with construction sector as the major consumer
- **Antioxidants, antistatic agents, and lubricants are expected to experience the highest growth**, driven by the expected additional production capacity of resins²
- **Other additives** growth is **expected to follow plastic consumption**, which is driven by the National Industrial Strategy (NIS)

1. Assumed at current market price
 2. These additive types are added during the production of resins for most of polymers

للطاقة وطن
ENERGY HAS ITS HOME

وزارة الطاقة
MINISTRY OF ENERGY



Thank You