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TiO₂ Forecast & Strategic Review: The Tariffs in Europe Are a Reality

2024 continues to bring a constantly changing landscape to the TiO₂ industry. Demand in North America and Europe is not exciting anyone. However, large tariffs on Chinese imports into Europe, and favorable, though uncertain political and macro-economic news, seem to signal good news for the industry is on the horizon. The uncertainty continues to be timing and degree.

TiPMC provides its insight, along with its analytics to provide its view of the current direction of the TiO₂ industry. Looking at history and currently available data, we have developed regional quarterly price forecasts for 2024 and 2025, along with a yearly forecast extending through 2029. We have developed upside and downside scenarios for pricing, along with our logic explaining the cases presented. The tariff question is still developing, as pending tariff decisions on Chinese exports loom even larger than the new tariffs levied by the EU. We provide data with insight and explain our view of how we believe the current signals will impact the supply and demand balance for all segments in the coming quarters.

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We also look at these questions:

- What is the likely response to the new tariffs on the part of both the Multi-National Producers (MNP) and Chinese producers? How will their decision be impacted by their future view of costs, particularly feedstocks?
- How will regional dynamics change? How might shifts occur to the market, particularly regional share and price? It may not be as straight forward as we think.
- What is export data telling us, and what type of comments we can expect from CEO's on second quarter results and third quarter outlooks?
- Do Anti-Dumping Tariffs present a solution to European producers, or do they simply buy time to improve current operations?
- How will utilization rates be impacted, for both Chinese and MNP producers? How does the most recent political and macro-economic developments impact today's decisions, in light of the most likely scenarios for 2025?
- Chinese producers appear to be reaching a cross-roads. Will they change their overall philosophy, or continue business as usual? What are the impacts of either decision? What is most likely?

Continued

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I welcome your calls, questions and requests.



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