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## TiO<sub>2</sub> Forecast & Strategic Review: Tariffs and the Brave New World for Chinese Producers

Leading economies throughout the world are stepping up the pressure on Chinese imports of all types. Although importing countries do benefit from low product prices, they are also becoming more and more concerned about the cost of losing key domestic industries. Interestingly, TiO<sub>2</sub> is one of the industries at the forefront of this shift in thinking. The EU and Brazil have already implemented aggressive tariff structures on TiO<sub>2</sub>, and India and now Saudi Arabia have ongoing investigations that most observers believe will result in similarly high tariffs in those two countries. Still, Chinese producers continue to expand, with the total official nameplate capacity of Chinese producers exceeding 6MTPA.

TiPMC provides insight and analytics to provide a clear view of the current direction of the TiO<sub>2</sub> industry. Looking at industry history and the latest data, TiPMC has developed regional quarterly price forecasts for 2024 and 2025, along with a yearly forecast extending through 2029. We have developed our view of how the combination of tariffs and expanded Chinese capacity will further segment the TiO<sub>2</sub> industry, and how Multi-National Producers (MNPs) and regional producers outside of China are likely to respond. The scenarios presented are both informative and insightful.

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### *We also look at these questions:*

- In its current state, the TiO<sub>2</sub> industry is considered by many to be “un-investable”. How will this belief among owners and investors shift the response to the tariffs among the MNPs?
- Why are the tariffs defensible, and how long will they likely remain in effect? What must the MNPs do to make themselves more competitive, given the window of opportunity presented by the tariffs?
- What is the ultimate position for Chinese producers? The numbers indicate they are well-positioned to receive most of the industry growth, but why are they consistently adding TiO<sub>2</sub> capacity beyond any reasonable growth projections?
- What is the evidence that the Chinese addressable market for TiO<sub>2</sub> exports may be saturated?
- How will the tariffs impact regional pricing, given the low utilization rate of some

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producers? How will the TiO<sub>2</sub> producers outside China, some of whom already have high operating rates, respond to the tariffs?

- What does all this mean for feedstock producers?
- Why is large scale suddenly less advantageous? How does the scale of a competitive plant shape each producer's response to the new world of tariff protection for local producers? Who may be the big winners?

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I welcome your calls, questions and requests.



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