

# POLYURETHANE PRODUCTS AND CHEMICALS IN SOUTH AMERICA & MEXICO 2003 & 2008

## *Second Edition*

**Publication: July 2004**

**Price: \$4,500**

IAL Consultants is pleased to announce the second edition of our report on the polyurethane markets in South America & Mexico.

After several years of economic recession Latin America's GDP should grow by 3.5% during 2004. Overall, this is expected to produce a growth rate of 4.1% in the production of polyurethane. However, this aggregate figure covers a range of performance from 0.7% AAGR in Venezuela to 4.8% in Peru between 2003-2008.

The production of PU in Mexico is expected to grow by 4.1% per year although the projected upturn is contingent on the U.S. recovery, and the continued transfer of production here from North of the border. Despite a 10% decline in Brazil's production of flexible foam during 2003, the overall production of PU is expected to grow due to increased automotive and refrigeration production aimed at export markets on the Americas and Asia.

Argentina remains the most volatile PU market in Latin America, after six years of recession, the country is experiencing an economic boom. This boom will not be reflected in the PU industry since many sectors are in almost terminal decline. Production of footwear and upholstered furniture has declined by more than 50% over the past 2 years, and automotive production remains well below 1998 output.

In the rest of the region production is patchy due to lack of readily available raw materials, lack of technology, competition from lower priced materials, especially for furniture and construction products. However, production should increase due to population growth and rising living standards.

The main drivers for this growth are expected to be:

- Automotive OEM growth
- Cheaper exports to North America
- Investment from Asia keen to gain access to NAFTA region
- Improvement in US economy in line with Presidential elections

The market data will be broken down for each of the following countries:

- **Mexico**
- **Brazil**
- **Argentina**
- **Venezuela**
- **Chile**
- **Colombia**
- **Peru**
- **Rest of South America**

Using the latest available information from official and industry sources the report will summarise the production of polyurethane products and the associated demand for polyurethane chemicals. Data will be provided for the year 2003, in addition to forecasts for 2008.

<b>Production of Polyurethane in Mexico &amp; South America 1998-2008 (Tonnes)</b>			
<b>Country</b>	<b>1998</b>	<b>2003</b>	<b>2008</b>
Mexico	131,000	155,940	190,830
Brazil	283,350	291,650	366,880
Argentina	55,000	33,680	35,980
Rest of South America	109,000	109,900	128,900
<b>TOTAL</b>	<b>578,350</b>	<b>591,070</b>	<b>722,590</b>

Source: IAL Consultants

# Contents

1. Introduction
2. Economic Data for Mexico & South America
3. Executive Summary of Production 2003 & Forecasts for 2008, by Product
4. Raw Material Supply & Demand
  - Isocyanates
  - Polyols
  - Supply Channels – Manufacturers, System Houses, Distributors & Traders
5. Polyurethane Production by Country and Product Type for 2003 & 2008
  - Mexico
  - Brazil
  - Argentina
  - Venezuela
  - Chile
  - Colombia
  - Peru
  - Rest of South America
6. Polyurethane Production by End-Use Markets, 2003 & 2008
  - Automotive
  - Construction
  - Furniture & Bedding
  - Footwear
  - Refrigeration
7. Directory of Raw Material Suppliers and Polyurethane Processors
  - Raw Material Suppliers
  - Rigid Foam Producers
  - Flexible Foam Producers
  - Coating Producers
  - Adhesive & Sealant Producers
  - Elastomer Producers
8. Sources of Information



## ORDER FORM

**I wish to purchase a copy of:**

**Polyurethane Products & Chemicals in South America & Mexico** **\$4,500**   
(Four thousand five hundred US dollars only)

Add Postage & Packing                      UK \$15                      Overseas Courier      \$45

I enclose a cheque       Invoice my company                       I have arranged a bank transfer

**Bank Details of IAL Consultants:**

HSBC plc, 20 Eastcheap, London EC3M 1ED Account No. 01215469 Sortcode: 40 02 31  
Swiftcode: MIDLGB2106G                      IBAN: GB72MIDL40023101215469

Charge my Visa/MasterCard	Name of cardholder .....
	Address of cardholder .....
	Card Security Code (last three digits) .....
	Card No. ....
	Expiry Date .....

Name: ..... Address: .....

Position: .....

Company: ..... Email .....

Telephone: ..... Fax: .....

Signature: ..... Date: .....

EC COUNTRIES ONLY: Please supply your VAT registration No: .....

**PLEASE SEND ME MORE INFORMATION ON IAL CONSULTANTS' REPORTS AND TAILOR MADE RESEARCH SERVICES**

**PLEASE POST OR FAX THIS ORDER FORM TO:**

**IAL Consultants**

**(A Business Research Group Company)**

**CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL**

**Tel: +44 (0) 20 8832 7780 Fax: +44 (0) 20 8566 4931**

**Email: [cathy.galbraith@brg.co.uk](mailto:cathy.galbraith@brg.co.uk) Web site: [www.ialconsultants.com](http://www.ialconsultants.com)**