

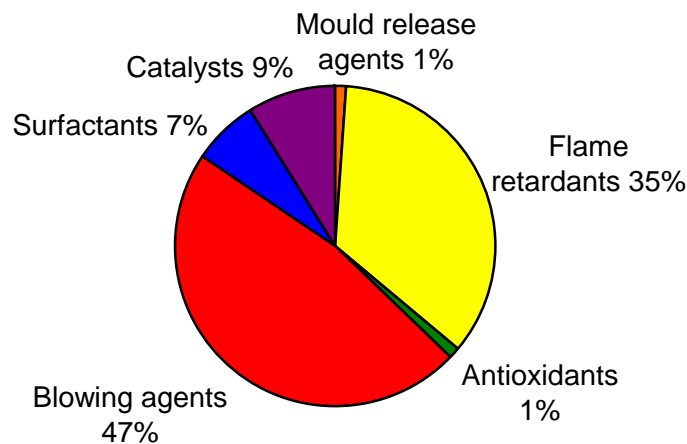


POLYURETHANE ADDITIVE MARKETS IN EUROPE, MIDDLE EAST & AFRICA

IAL Consultants is pleased to announce the availability of a new report for the chemical industry titled *Polyurethane Additive Markets in Europe, Middle East and Africa*.

This new study provides information on the usage and growth prospects for the main additive types which are consumed by the polyurethane industry, which have been identified as blowing agents, catalysts, flame retardants, mould release agents, surfactants and antioxidants. Total demand for these six additive types in the EMEA region exceeded 237,000 tonnes in 2005, with blowing agents and flame retardants accounting for 82% of the market, as seen in the chart:

Demand for Major Polyurethane Additive Types in Europe, Middle East & Africa, 2005 (Tonnes)



Source: IAL Consultants

The greatest growth prospects across all types is now to be found in the Middle East and African region, typically at 8-10% pa, which contrasts with 6-7% pa in Eastern Europe and 2-3% pa in Western Europe.

Among some of the trends which are observed in the consumption of these additives are:

- Entry of third-generation HFC blowing agents for rigid and flexible foams within Europe
- Limited uptake of hydrocarbon technology in the Russian flexible foam sector owing to affordability only by the top tier of industry
- Emergence of non-fugitive catalysts targeted at VOC emission reduction within the automotive OEM sector
- Declining popularity of potassium acetate catalysts in recent years
- Flame retardant use is being driven by EU legislation, but outside the EU there is very little growth in their use expected.
- Mould release agents (MRAs) are being driven towards water-based and especially silicon-based types
- Wax-based MRAs remain popular in Eastern Europe, particularly Russia.
- Liquid antioxidants are gaining in popularity in the EU as they are easier to handle; however, they are more expensive.

As well as an extensive numerical characterisation of the polyurethane additive markets by application and region, the report offers considerable insight into market trends for the industry and a five-year market forecast to 2010 together with profiles and a directory of additive suppliers. Trade associations are also listed by country.

Polyurethane Additive Markets in Europe, Middle East and Africa is now available from IAL Consultants, price €3,000. Sections priced individually will be shortly be available to buy online from IAL's website:

www.ialconsultants.com

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