

AN OVERVIEW OF THE GLOBAL MARKET FOR AROMATIC POLYESTER POLYOLS

Publication: December 2000

Price: \$1,500

IAL Consultants is pleased to announce the publication of its latest report for the polyurethane industry, analysing the global demand for aromatic polyester polyols, within the major end-use markets across the world. Consumption figures have been derived from industry sources, but are provided alongside production figures for each type of polyurethane product.

Global consumption of aromatic polyester polyols for 2000 is reported to be just under 220,000 tonnes. Forecasts for 2005 suggest growth in consumption to at least 270,000 tonnes by 2005

Total global production capacity for these polyester polyols is reported to be in excess of 300,000 tonnes, accounting for some 11.5% of the world's total polyurethane polyol capacity, which is estimated to be 3.45 million tonnes. The report also provides data on capacities and production routes for the major manufacturers.

The geographical coverage of this report includes data for production and consumption of polyols in the following major markets:

- **Europe**
- **North America**
- **Mexico & South America**
- **Asia Pacific (inc. China)**
- **Japan**
- **Middle East & Africa**

This report reviews the consumption of polyester polyols by the following major end-use markets:

- **PIR/PUR Slabstock/Bunstock**
- **PIR/PUR Panels and Boardstock**
- **Spray Foams**
- **Pour-in-Place**
- **OCF**
- **Appliances**
- **CASE Markets**

Industry estimates for production of end-use products are given where available, in order to substantiate market figures for polyol demand. Major end-users are also listed.

Market Trends and Influences

- The USA has the highest consumption of aromatic polyester polyols where they are used in the production of laminates and boardstock supplied to the construction industry
- Global demand for aromatic polyester polyols is reported to be around 220,000 tonnes in 2000, with demand from the USA accounting for some 80% of the total
- European demand for aromatic polyester polyols is anticipated to show growth rates of up to 10% per year, due to increasing demand for flame retardant polyurethane insulation required to meet fire & safety standards
- The rigid foam industry is largely supplied either directly by the polyol manufacturers or by systems houses
- There has been a sharp increase in the production capacity for aromatic polyester polyols in Europe during 2000. This is due to increased expectations of the market in Europe reaching consumption levels seen in the USA
- The cost position of each of the polyol manufacturers varies depending upon the raw materials sources used.

Brief technical and commercial information is provided within the report for each end-use market. A directory listing the manufacturers of aromatic polyester polyols in each region is also included.

Contents

1. **Introduction**
2. **Executive Summary**
 - Technical Background
 - Major Global Producers
 - Market Trends and Influences
- **Global Consumption 2000 & 2005**
- **Global Consumption by End Use & Region 2000 & 2005**
- **Global Growth Rates**
- **Global Production Summary**
 - PUR/PIR Laminates & Boardstock
 - OCF
 - Rigid Spray Foam
 - Appliances
 - Pour-in-Place Foam
 - CASE Applications
3. **Global Production of Polyester Polyols**
 - Production Capacity in Europe
 - Production Capacity in the Americas
 - Production Capacity in Asia-Pacific
 - Trends and Issues Affecting Production
4. **Global Consumption of Polyester Polyols**
 - PUR/PIR Slabstock/Bunstock
 - Global Production of PUR/PIR Slabstock
5. **Directory of Polyester Polyol Producers**
 - Europe
 - The Americas
 - Asia-Pacific
6. **Sources of Information**



ORDER FORM

I wish to purchase a copy of:

An Overview of the Global Market for Aromatic Polyester Polyols - \$1,500
(One thousand, five hundred US Dollars)

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

Charge my Visa/MasterCard	Name of cardholder
	Address of cardholder
	Card No.
	Expiry Date

Name: Address:

Position:

Company:

Telephone: Fax:

Signature: Date:

EC COUNTRIES ONLY: Please supply your VAT registration No:

PLEASE SEND MORE INFORMATION ON IAL'S RELATED MARKET STUDY – AN OVERVIEW OF THE GLOBAL MARKET FOR ALIPHATIC POLYESTER POLYOLS

PLEASE POST OR FAX THIS ORDER FORM TO:

IAL Consultants

109 Uxbridge Road, Ealing, London W5 5TL

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

Email: ial@brg.co.uk Web site: www.ialconsultants.com