

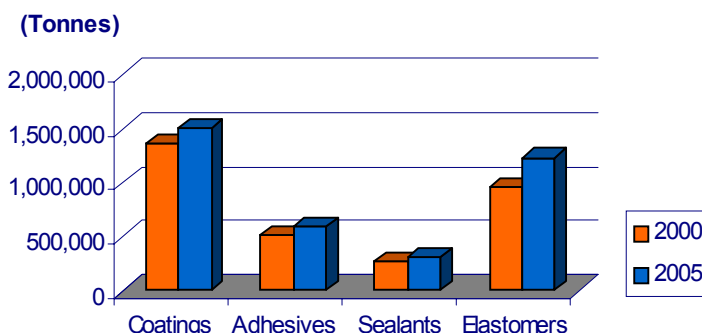
# GLOBAL OVERVIEW OF THE POLYURETHANE CASE MARKETS

Publication: May 2001

This is the first edition of IAL's 'Global Overview of the Polyurethane CASE Markets' (Coatings, Adhesives, Sealants & Elastomers).

The global market for formulated polyurethane CASE products was estimated at 3.1 million tonnes in 2000, with total isocyanate demand accounting for around 900,000 tonnes and total polyol demand accounting for almost 1.5 million tonnes. The largest market was PU coatings, accounting for around 44% of global demand. PU elastomers are experiencing the fastest growth at an annual average of 5.1% to 2005, largely due to the high growth in demand for PU elastomeric fibres (Spandex).

Global Demand for PU CASE Products by Type 2000-2005



Source: IAL Consultants

Europe, Middle East & Africa (EAME) accounts for around 37% of total production of all PU CASE products, with the Americas and Asia-Pacific accounting for 32% and 31% respectively. In terms of demand for CASE products, Asia-Pacific is forecast to experience the strongest growth at 4.1% p.a. to 2005. Production is also expected to increase most rapidly in Asia-Pacific, due in part to the continued shift of production to countries such as China where manufacturing costs are significantly lower.

The report is presented in six major volumes, comprising 18 separate sections that can also be purchased individually. In total, this report contains over 2,400 pages and in excess of 1,500 tables of information. Data for the consumption and production of these specialist polyurethane products can be purchased on a regional or product basis. All data is given in metric tonnes. A more detailed table of contents is provided overleaf. The report aims to provide the most comprehensive review of the demand for polyurethane raw materials throughout the main global market sectors, and for the first time allows comparison across these regions.

## CASE MARKET BY PRODUCT:

<b>Volume I – Coatings</b>	<b>\$8,900</b>
<b>Volume II - Adhesives &amp; Sealants</b>	<b>\$8,900</b>
<b>Volume III - Elastomers</b>	<b>\$8,900</b>
<b>Global Market by Product* (Volumes I-III)</b>	<b>\$24,000</b>

## CASE MARKET BY REGION:

<b>Volume IV – Europe, M. East &amp; Africa</b>	<b>\$8,900</b>
<b>Volume V – The Americas</b>	<b>\$8,900</b>
<b>Volume VI – Asia-Pacific</b>	<b>\$8,900</b>
<b>Global Market by Region* (Volumes IV-VI)</b>	<b>\$24,000</b>

**Complete Report\* (Volumes I-VI) \$30,000**

\*includes Global Executive Summary

IAL Consultants

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

North American Office:

Tel: +1 973 347 5300 ♦ Fax: +1 973 347 6466 ♦

e-mail: [ial@brg.co.uk](mailto:ial@brg.co.uk) ♦ website: [www.ialconsultants.com](http://www.ialconsultants.com)

Production and consumption of finished CASE products are provided, along with related consumption of polyurethane raw materials for 2000. Forecasts for 2005 and annual growth rates are also provided for each product type and end-use in each of the countries/regions listed below:

### Geographical Scope:

Data is provided for each country listed below and aggregated to provide regional summaries:

#### Europe, Middle East & Africa (EMEA)

##### Western Europe

- Benelux
- France
- Germany
- Iberia
- Italy
- Nordic Region
- Switzerland & Austria
- UK & Ireland

##### Eastern Europe

- Czech Republic
- CIS
- Hungary
- Poland
- Russia
- Slovak Republic
- Slovenia
- Rest of Eastern Europe

##### Middle East & Africa

- Egypt
- Iran
- South Africa
- Syria
- Turkey
- Rest of Middle East & Africa

#### The Americas

##### North America

- Canada
- Mexico
- USA

##### South America

- Argentina
- Brazil
- Chile
- Colombia
- Venezuela
- Rest of South America

#### Asia-Pacific

- Australia
- China
- India
- Indonesia
- Japan
- Malaysia
- Singapore
- South Korea
- Taiwan
- Thailand
- Rest of Asia-Pacific

### Product Scope:

**Coatings:** Aircraft; Architectural; Automotive; Commercial Vehicles; Industrial; Maintenance; Plastic; Marine/Offshore; Roof, Tank & Deck; Textiles & Leather; Wood & Furniture

**Adhesives:** Automotive; Construction; Flexible Packaging; Footwear; General Assembly; Sandwich Panels; Wood & Furniture

**Sealants:** Construction; Auto Direct Glazing; Insulated Glazing; Other Transport; Other

**Elastomers:** Cast; Fibres; Footwear; RIM/RRIM; Technical Microcellular; TPUs

### Raw Materials:

Consumption of the major polyurethane raw materials is provided for each country/market and each product for 2000. Forecasts for 2005 are also given:

**Isocyanates:** MDI; TDI; NDI; Aliphatic Isocyanates      **Polyols:** Polyether Polyols; PTHF Polyols; Acrylic Polyols; Polyester Polyols

**Production capacities** for manufacturers of isocyanates and polyols are also provided by country and region, for 2000, along with a directory of raw material manufacturers.

Each report contains the following main chapters:

- Introduction
- Technical Background
- Market Trends and Influences
- Major Manufacturers of PU CASE Products
- Sources of Information

The information in this study is presented in two main formats:

- **By Product**
- **By Region**

Volumes I-III cover the global PU CASE market by product type and Volumes IV-VI cover the global market by region. Each volume consists of a number of sections, as follows:

## **POLYURETHANE CASE MARKET BY PRODUCT:**

### **VOLUME I – COATINGS**

- Section 1 : EMEA (Europe, Middle East & Africa)
- Section 2 : The Americas (North America, South America)
- Section 3 : Asia-Pacific
- Section 4 : Global Coatings Summary\*

### **VOLUME II – ADHESIVES & SEALANTS**

- Section 1 : EMEA (Europe, Middle East & Africa)
- Section 2 : The Americas (North America, South America)
- Section 3 : Asia-Pacific
- Section 4 : Global Adhesives & Sealants Summary\*

### **VOLUME III – ELASTOMERS**

- Section 1 : EMEA (Europe, Middle East & Africa)
- Section 2 : The Americas (North America, South America)
- Section 3 : Asia-Pacific
- Section 4 : Global Elastomers Summary\*

\* only available to purchasers of the complete volume

## **POLYURETHANE CASE MARKET BY REGION:**

### **VOLUME IV – EMEA (EUROPE, MIDDLE EAST & AFRICA)**

- Section 1 : Raw Materials
- Section 2 : Western Europe (Coatings, Adhesives, Sealants, Elastomers)
- Section 3 : Eastern Europe (Coatings, Adhesives, Sealants, Elastomers)
- Section 4 : Middle East & Africa (Coatings, Adhesives, Sealants, Elastomers)
- Section 5 : Regional Summary\*

### **VOLUME V – THE AMERICAS**

- Section 1 : Raw Materials
- Section 2 : North America (Coatings, Adhesives, Sealants, Elastomers)
- Section 3 : South America (Coatings, Adhesives, Sealants, Elastomers)
- Section 4 : Regional Summary\*

### **VOLUME VI – ASIA-PACIFIC**

- Section 1 : Raw Materials
- Section 2 : Asia-Pacific (Coatings, Adhesives, Sealants, Elastomers)
- Section 3 : Regional Summary\*

\* only available to purchasers of the complete volume

**A Global Executive Summary** covering the global market for all polyurethane CASE products. It is provided as a slide presentation and contains charts and tables for quick and easy reference.

**THIS GLOBAL EXECUTIVE SUMMARY IS ONLY AVAILABLE TO PURCHASERS OF ANY OF THE FOLLOWING:**

- **The Complete Report (Volumes I-VI)**
- **Market by Product (Volumes I-III)**
- **Market by Region (Volumes IV-VI)**

# GLOBAL OVERVIEW OF THE POLYURETHANE CASE MARKETS

## ORDER FORM

I would like to purchase the following Volumes and/or Sections of this report (please tick):

### **PU CASE MARKET BY PRODUCT:**

**VOLUME I – COATINGS** **Price**  
 Section 1 : EMEA \$8,900   
 Section 2 : The Americas \$3,900   
 Section 3 : Asia-Pacific \$3,900   
 Section 4 : Global Coatings Summary\* \$3,900

**VOLUME II – ADHESIVES & SEALANTS** **Price**  
 Section 1 : EMEA \$8,900   
 Section 2 : The Americas \$3,900   
 Section 3 : Asia-Pacific \$3,900   
 Section 4 : Global Adhesives & Sealants Summary\* \$3,900

**VOLUME III – ELASTOMERS** **Price**  
 Section 1 : EMEA \$8,900   
 Section 2 : The Americas \$3,900   
 Section 3 : Asia-Pacific \$3,900   
 Section 4 : Global Elastomers Summary\* \$3,900

\* only available to purchasers of the complete volume

**Global CASE Market by Product** **Price**  
 (Volumes I-III + Global Exec. Summary) \$24,000

### **PU CASE MARKET BY REGION:**

**VOLUME IV – EMEA** **Price**  
 Section 1: Raw Materials \$8,900   
 Section 2 : Western Europe \$2,600   
 Section 3 : Eastern Europe \$3,100   
 Section 4 : Middle East & Africa \$3,100   
 Section 5 : Regional Summary\* \$3,100

**VOLUME V – THE AMERICAS** **Price**  
 Section 1 : Raw Materials \$8,900   
 Section 2 : North America \$2,600   
 Section 3 : South America \$4,600   
 Section 4 : Regional Summary\* \$4,600

**VOLUME VI – ASIA-PACIFIC** **Price**  
 Section 1 : Raw Materials \$8,900   
 Section 2 : Asia-Pacific \$2,600   
 Section 3 : Regional Summary\* \$8,100

**Global CASE Market by Region** **Price**  
 (Volumes IV-VI + Global Exec. Summary) \$24,000

All prices exclude shipping charges which range from \$45-\$100, according to number of volumes ordered

**Complete Report (Volumes I-VI) + Global Executive Summary** **\$30,000**

If you would like to order additional copies of any of the reports purchased, please fill in below:

	Price	No. of Copies		Price	No. of Copies
Global CASE Market by Product	\$750	.....	Global CASE Market by Region	\$750	.....
Per Additional Volume (I-VI)	\$500	.....	Per Additional Section	\$200	.....

For the Complete Report, the Market by Product and the Market by Region only, the report is also available on CD-ROM in Adobe Acrobat® format at an additional cost of \$500 per copy. Please state below whether you would like to receive the report in printed copy only, CD only or both. If you would like to receive individual sections in electronic format, please contact us for details.

Print Copy

CD-ROM

Print Copy & CD-ROM

NAME \_\_\_\_\_ ADDRESS \_\_\_\_\_

POSITION \_\_\_\_\_

COMPANY \_\_\_\_\_

TELEPHONE \_\_\_\_\_ FAX \_\_\_\_\_

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

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

**Bank details: HSBC plc, 20 Eastcheap, London EC3M 1ED**  
 Account No: 01215469 Sortcode: 40 02 31 Swift Code: MIDLGB22

**Charge my Visa/MasterCard:**  
 Name of cardholder .....  
 Address of cardholder .....

Card No. ....  
 Expiry Date .....

Please fax or post this form to:

**IAL Consultants** ♦ 109 Uxbridge Road London W5 5TL UK ♦ Tel: +44 (0) 20 8832 7780 ♦ Fax: +44 (0) 20 8566 4931 ♦  
 e-mail: ial@brg.co.uk ♦ website: www.ialconsultants.com