

China Rigid Polyurethane Foam and Raw Materials Report, 2009-2012



Rigid polyurethane foam is mainly applied in such fields as refrigerator and freezer, automobile, water heater, and heat preservation of building. According to the structure of demand for polyurethane in China in 2009, refrigerator and freezer took the largest proportion and accounted for 39.4% of the total consumption of rigid polyurethane foam, while building heat preservation held merely 4.2%; in the USA, however, building heat preservation accounted for more than 50% of the total consumption of rigid polyurethane foam. The difference in consumption structure results from the fact that China, as a big manufacturer of refrigerator and freezer, has a relatively large demand for rigid polyurethane foam in the field of refrigerator and freezer, but, with few requirements on building energy conservation and hence low utilization of heat insulators for external walls in the past, has a relatively small demand for rigid polyurethane foam in the field of building heat preservation.

With China's increasing requirements on building energy saving and the excellent heat insulation and preservation performance of rigid polyurethane foam, there will be great development space for the application of rigid polyurethane foam in building energy saving field. In addition, the application of rigid polyurethane foam in solar water heater field will also see a rapid growth.

The report underlines not only the demand, the demand structure, as well as the future demand growth, supply & demand balance, and import & export of rigid polyurethane foam but also the development of major manufacturers of rigid polyurethane foam 'black material' (polymeric MDI) and 'white material' (rigid polyurethane foam combined polyether).

In regard to rigid polyurethane foam 'black material' (polymeric MDI) industry, the entire market is dominated by a few manufacturers: besides Yantai Wanhua Polyurethanes Co., Ltd., only seven companies worldwide including BASF, Bayer, Huntsman, Dow Chemical, and Japan's NPU are in possession of the core production technology of MDI. Chinese manufacturers of polymeric MDI cover Yantai Wanhua Polyurethanes Co., Ltd., Bayer Polymers (Shanghai), Shanghai Lianheng Isocyanate Co., Ltd. (a joint venture of BASF in China), etc., wherein, Yantai Wanhua accounts for more than 60% of the total capacity. There are many, over 20 in 2009, manufacturing enterprises in rigid polyurethane foam combined polyether industry, with relatively scattered capacity distribution and comparatively low enterprise concentration ratio. Nevertheless, along with the capacity expansion of companies like Nanjing Hongbaoli Co., Ltd., Hebei Yadong Chemical Group Co., Ltd., and Bayer (China), the concentration ratio of 'white material' manufacturers will witness an evident rise.

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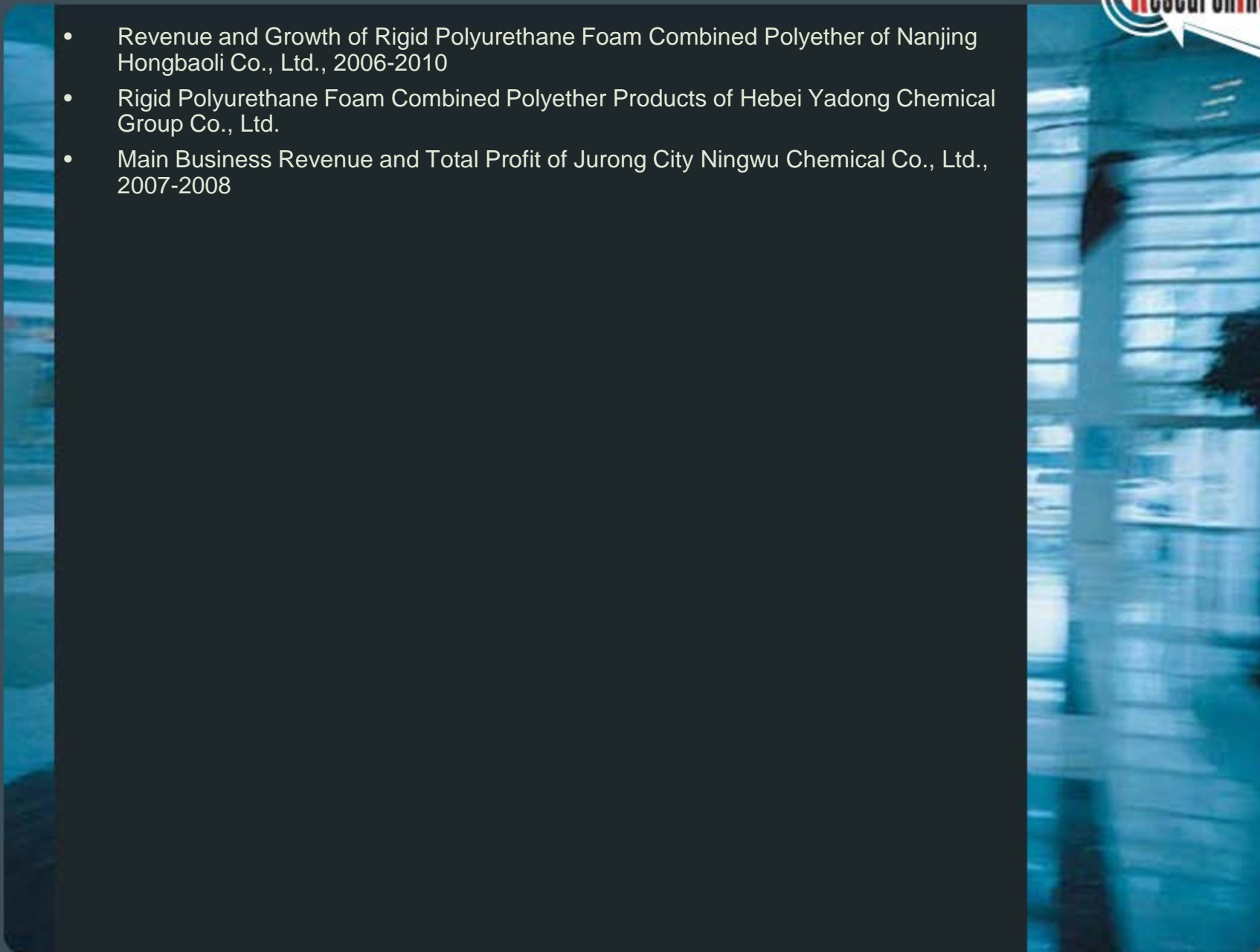
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