Global and China Polyurethane Industry Chain Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Polyurethane Industry Association, National Bureau of Statistics of China and WIND Database etc.

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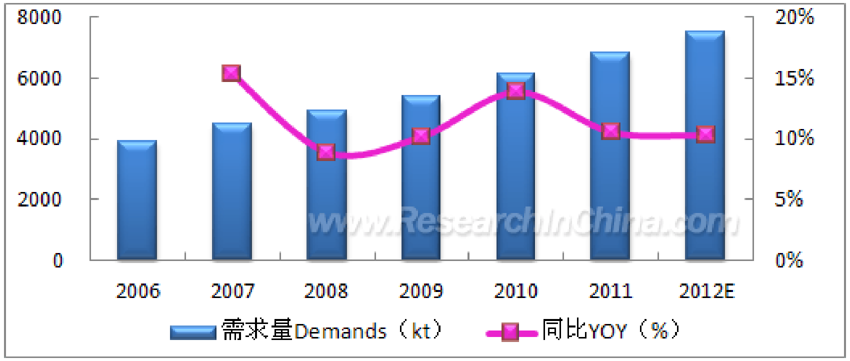
Abstract

Polyurethane is the general name for polymers including multiple carbamate groups (-NHCOO-) on main chain of a polymer structure; and its products comprise rigid & flexible PU foams, elastomer, coating, adhesive and fiber, etc.

In 2011, global polyurethane product output approximated 17.65 million tons; rigid & flexible PU foams made larger contribution, around 60% of total output. With the rapidly increasing demand for polyurethane in the Asia Pacific Region, global polyurethane production center has been moved to Asia-Pacific region, especially China. China's polyurethane product output accounted for around 33.7% of the global total in 2011.

China's PU product demand saw a CAGR of 11.8% from 2006 to 2011. In particular, the demand reached 6.8 million tons in 2011, with the self sufficiency rate 87.5%. Among China's PU products, rigid & flexible PU foams, synthetic leather pulp and coating showed higher demand; and their accumulative demands occupied about 80% of total PU product demand in China in 2011.

Demand and YoY Growth Rate of PU Products in China, 2006-2012E



Source: ResearchInChina< Global and China Polyurethane Industry Chain Report, 2011-2012>

Upstream raw materials for polyurethane involve three categories including isocyanate (MDI,TDI, etc.), polylol (PPG, PTMEG, BDO, AA, etc.) and auxiliary (mainly DMF).

1 MDI

In 2011, global MDI capacity approximated 6 million tons, and merely around 10 enterprises were engaged in MDI production, with a very high concentration degree in the industry. In terms of production capacity, Bayer, BASF and Yantai Wanhua Polyurethanes Co., Ltd. ranked the top three, followed by Huntsman, DOW and NPU etc. In the same year, China became the largest MDI producer in the world, with capacity sharing 23.9% of the world's total.

2 TDI

Worldwide TDI capacity reached 2.5 million tons or so in 2011. Bayer, BASF, MITSUI, Hebei Cangzhou Dahua Co., Ltd. and Perstorp are leading companies; and their aggregate capacities enjoyed roughly 70% of the global total TDI capacity in the same year. Worldwide TDI capacity is mainly distributed in China, South Korea and the United States.

3 PPG

Global PPG industry also characterizes a high concentration degree; and leading players comprise Bayer, DOW, Shell, BASF and Huntsman, etc. There are many PPG producers in China, but most with limited capacity, including Shanghai Gaoqiao Petrochemical Co., Ltd., Shandong Bluestar Dongda Chemical Industry Company and Nanjing Hongbaoli Co., Ltd. etc.

This report resolves around the followings:

- Supply & demand, product mix and regional distribution of global PU industry;
- Industrial policies, supply & demand, product mix, import & export and development trend of Chinese PU industry;
- Demand analysis and consumption structure of market segements such as rigid & flexible PU foams, elastomer and coating etc in China and beyond;
- Production capacity, projects under construction and to be built, competition pattern, import & export and price trend of global and China's MDI, TDI and PPG industries;
- Analysis and prediction on PU demand in building energy-saving, refrigeration, water heater and automobile industries in China;
- Operation, PU business and development of 10 PU manufacturers and raw material producers around the globe.

Table of contents

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Selected Charts

- Performance Comparison between Polyurethane and Traditional Materials
- Classification of Polyurethane Raw Materials
- Polyurethane Products and Their Raw Materials and Application Fields
- Polyurethane Industry Chain
- Output of Polyurethane Products in China, 2001-2016E
- Output Structure of Polyurethane Products Worldwide by Product, 2011
- Output Structure of Polyurethane Products Worldwide by Region, 2011
- Policies on Polyurethane Industry in China, 2011
- Demand and Growth Rate of Polyurethane Products in China, 2006-2012E
- Demand Structure of Polyurethane Products in China by Products, 2011
- Import and Export Volume of Polyurethane Resin in China, 2008- H1 2012
- Average Price of Polyurethane Resin Imports and Exports in China, 2008-H1 2012
- Import Origins of Polyurethane Resin in China by Import Volume, 2011
- Export Destinations of Polyurethane Resin in China by Export Volume, 2011
- Raw Materials and Functions of Rigid PU Foam
- Demand and Growth Rate of Rigid PU Foam in the World, 2006-2012E
- Consumption Structure of Rigid PU Foam in the USA, 2011
- Demand and Growth Rate of Rigid PU Foam in China, 2006-2012E
- Consumption Structure of Rigid PU Foam in China, 2011
- Demand and Growth Rate of Flexible PU Foam in China, 2006-2012E
- Main MDI Manufacturers and Their Capacities in the World (Except Distillation Device) , 2011
- MDI Projects Planned/under Construction Worldwide, 2012
- Global MDI Capacities by Region, 2011
- Capacity Percentage of Key MDI Manufacturers Worldwide, 2011
- Main MDI Manufacturers and Their Capacities in China, 2008-2011

Selected Charts

- New MDI Capacities in China, 2012-2016E
- Import and Export Volume of Pure MDI in China, 2008- H1 2012
- Average Price of Pure MDI Imports and Exports in China, 2008- H1 2012
- Import Origins of Pure MDI in China by Import Volume, 2011
- Export Destinations of Pure MDI in China by Export Volume, 2011
- Import and Export Volume of Polymeric MDI in China, 2008- H1 2012
- Average Price of Polymeric MDI Imports and Exports in China, 2008- H1 2012
- Import Origins of Polymeric MDI in China by Import Volume, 2011
- Export Destinations of Polymeric MDI in China by Export Volume, 2011
- Monthly Average Price of Chinese MDI, 2010-2012
- Main TDI Manufacturers and Their Capacities in the World, 2011
- TDI Projects Planned/under Construction Worldwide, 2012
- Global TDI Capacities by Region, 2011
- Capacity Percentage of Key TDI Manufacturers Worldwide, 2011
- Main TDI Manufacturers and Their Capacities in China, 2008-2012E
- Consumption Structure of TDI in China, 2011
- Import and Export Volume of TDI in China, 2008-2012H1
- Average Price of TDI Imports and Exports in China, 2008-2012H1
- Import Origins of TDI in China by Import Volume, 2011
- Export Destinations of TDI in China by Export Volume, 2011
- TDI Ex-factory Price of Cangzhou Dahua, 2008-2012
- Capacity and Demand of PPG in the World, 2007-2012E
- Capacity Percentage of Key PPG Manufacturers Worldwide, 2011
- PPG Capacity and Growth Rate in China, 2008-2012E
- Main PPG Manufacturers and Their Capacities in China, 2011

Selected Charts

- PPG Price in Eastern China Market, 2008-2011
- Sketch Map of Traditional Wall Thermal Insulation Materials
- Performance Comparison of Main Thermal Insulation Materials
- Thickness of Main Thermal Insulation Materials with The Same Effect
- Comparison of Polyurethane's Three Kinds of Construction Mode
- Rigid PU Foam's Demand from Building Energy Efficiency Industry in China, 2010-2015E
- Output of Refrigerator and Freezer in China, 2011-2015E
- Rigid PU Foam's Demand from Refrigerator and Freezer in China, 2010-2015E
- Policies on Promotion of Solar Water Heater in China
- Rigid PU Foam's Demand from Solar Water Heater Industry in China, 2011-2015E
- Sales Structure of BASF by Division, 2011
- Sales and EBITDA of BASF Plastics, 2009-2011
- Sales Breakdown of BASF Plastics by Product, 2009-2011
- Sales Structure of BASF Plastics by Product, 2009-2011
- Sales Structure of Polyurethane Business of BASF Plastics by Region, 2009-2011
- Major Polyurethane Products of BASF, 2011
- BASF MDI Capacities by Region and Projects Planned/under Construction, 2011
- BASF TDI Capacities by Region and Projects Planned/under Construction, 2011
- Major Resin Products of Bayer Material Science AG
- Sales Structure of Bayer by Division, 2010-2011
- Sales and EBITDA of Bayer Material Science, 2009-2011
- Sales Breakdown of Bayer Material Science by Product, 2009-2011
- Sales Structure of Bayer Material Science by Product, 2009-2011
- Sales Breakdown of Bayer Material Science by Region, 2009-2011
- Sales Structure of Bayer Material Science by Region, 2009-2011

Selected Charts

- Bayer MDI Capacities by Region and Projects Planned/under Construction, 2011
- Bayer TDI Capacities by Region and Projects Planned/under Construction, 2011
- Revenue and EBITDA of Huntsman, 2009-2011
- Revenue Breakdown of Huntsman by Product, 2009-2011
- Revenue Structure of Huntsman by Product, 2009-2011
- Revenue Breakdown of Huntsman by Region, 2009-2011
- Revenue Structure of Huntsman by Region, 2009-2011
- Revenue and EBITDA of Polyurethane Division of Huntsman, 2009-2011
- Huntsman MDI Capacities by Region and Projects Planned/under Construction, 2011
- Sales Structure of DOW by Division, 2011
- Sales and EBITDA of Performance Material Division of DOW, 2009-2011
- Sales Structure of DOW Performance Material Division by Product, 2011
- DOW MDI Capacities by Region, 2011
- NPU MDI Capacities by Region and Projects Planned/under Construction, 2011
- Main Polyurethane Related Products of Yantai Wanhua
- Revenue and Net Income of Yantai Wanhua, 2007-2011
- Revenue Breakdown of Yantai Wanhua by Product, 2009-2011
- Revenue Structure of Yantai Wanhua by Product, 2009-2011
- Revenue Breakdown of Yantai Wanhua by Region, 2009-2011
- Revenue Structure of Yantai Wanhua by Region, 2009-2011
- Gross Margin of Main Products of Yantai Wanhua, 2009-2011
- MDI Capacity of Yantai Wanhua, 2011-2014E
- Revenue and Net Income of Wanhua Rongwei, 2008-2011
- Revenue and Net Income of Cangzhou Dahua, 2007-2011
- Revenue Breakdown of Cangzhou Dahua by Product, 2009-2011

Selected Charts

- Revenue Structure of Cangzhou Dahua by Product, 2009-2011
- Gross Margin of Main Products of Cangzhou Dahua, 2009-2011
- TDI Capacity, Output and Operating Rate of Cangzhou Dahua, 2008-2012E
- Revenue, Total Profit and Gross Margin of Yantai Juli, 2007-2009
- Revenue and Net Income of Nanjing Hongbaoli, 2007-2011
- Revenue Breakdown of Nanjing Hongbaoli by Product, 2009-2011
- Revenue Structure of Nanjing Hongbaoli by Product, 2009-2011
- Revenue Breakdown of Nanjing Hongbaoli by Region, 2009-2011
- Revenue Structure of Nanjing Hongbaoli by Region, 2009-2011
- Gross Margin of Main Products of Nanjing Hongbaoli, 2009-2011
- R&D Costs and % of Total Revenue of Nanjing Hongbaoli, 2009-2011
- Rigid Foam Combined Polyether Capacity of Nanjing Hongbaoli, 2009-2012E
- Revenue and Net Income of Lecron Energy Saving Materials, 2009-2011
- Revenue Breakdown of Lecron Energy Saving Materials by Product, 2009-2011
- Revenue Structure of Lecron Energy Saving Materials by Product, 2009-2011
- Revenue Breakdown of Lecron Energy Saving Materials by Region, 2009-2011
- Revenue Structure of Lecron Energy Saving Materials by Region, 2009-2011
- Gross Margin of Main Products of Lecron Energy Saving Materials, 2009-2011
- R&D Costs and % of Total Revenue of Lecron Energy Saving Materials, 2009-2011
- Lecron Energy Saving Materials' Revenue from Top 5 clients and % of Total Revenue, 2009-2011
- Name List, Revenue Contribution and % of Lecron Energy Saving Materials ' Top 5 Clients, 2011
- Lecron Energy Saving Materials' Procurement from Top 5 Suppliers and % of Total Procurement, 2009-2011
- Name List and Procurement of Lecron Energy Saving Materials ' Top 5 Suppliers, 2011
- Capacity, Output and Operating Rate of Rigid Foam Combined Polyether of Lecron Energy Saving Materials, 2009-2011
- Rigid Foam Combined Polyether Output of Lecron Energy Saving Materials by Application, 2009-2011

Selected Charts

- Sales Volume and Sales-output Ratio of Rigid Foam Combined Polyether of Lecron Energy Saving Materials, 2009-2011
- Sales Volume of Rigid Foam Combined Polyether of Lecron Energy Saving Materials by Application, 2009-2011

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