



Global and China Polyurethane Industry Chain Report, 2013-2016

Jan. 2014

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

Polyurethane products include polyurethane rigid foam, soft foam, elastomers, coatings, adhesives, fibers, etc., widely used in many fields such as automobile, refrigerator, construction, footwear, synthetic leather and fabric.

In 2013, the global output of polyurethane products hit about 19 million tons, 60% of which were polyurethane rigid and soft foam. In recent years, with the rapid growth in the polyurethane demand in Asia-Pacific region, the global polyurethane production center has transferred to Asia-Pacific, especially China.

In 2006-2013, China's demand for polyurethane products presented an AAGR of 11.2%. China's demand accounted for 43% of the world's total demand in 2013. Among Chinese polyurethane products, the demand for polyurethane rigid foam, soft foam, synthetic leather slurry and paint was huge, equivalent to roughly 80% of China's total demand for polyurethane products in 2013.

Polyurethane raw materials cover isocyanate (MDI, TDI), polyol (PPG, PTMEG, BDO, AA) and additives (DMF).

1 MDI

In 2013, the global MDI capacity of 6.8 million tons was generated by just 10 manufacturers or so in this industry, showing a high degree of concentration. In point of capacity, the top three companies -- Chinese Wanhua Chemical, Bayer and BASF contributed 62.9% to the world's total capacity; their counterparts consist of Huntsman, Dow, Nippon Polyurethane Industry and so on. The global polyurethane capacity is mainly available in China, the United States and Europe, in which China occupies about 1/3 share.

2 TDI

In 2013, the global TDI capacity approximated 2.6 million tons, 71.2% of which was contributed by Bayer, BASF, BorsodChem (a subsidiary of Wanhua Chemical), Japan Mitsui and China Cangzhou Dahua. The global TDI capacity is mainly distributed in China holding 1/3 share, the United States and South Korea.

3 PPG

Bayer, Dow, Shell and BASF dominate the global PPG industry. The capacity of numerous Chinese PPG manufacturers is rather limited; major Chinese companies include SINOPEC Shanghai Gaoqiao, Shandong Dongda Chemical, Nanjing Hongbaoli and so forth.

The report highlights the followings:

- ✘ Supply, demand, product structure and geographical distribution of the global polyurethane industry;
- ✘ Industrial policies, supply, demand, product structure, import, export and development trends of China polyurethane industry;
- ✘ Demand and consumption structure of global and Chinese polyurethane rigid foam, soft foam, elastomer, paint and other market segments;
- ✘ Capacity, competition patterns, import, export and prices of global and Chinese MDI, TDI, PPG and other industries;
- ✘ The demand of Chinese building energy saving, refrigeration, water heater and automobile industries for polyurethane;
- ✘ Operation and polyurethane business of 10 global and Chinese polyurethane and raw materials production enterprises.

World's Major MDI/TDI Companies and Their Capacity Proportions, 2013



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