

**Global and China Polyurethane Industry
Chain Report, 2014-2017**

Jan. 2015

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

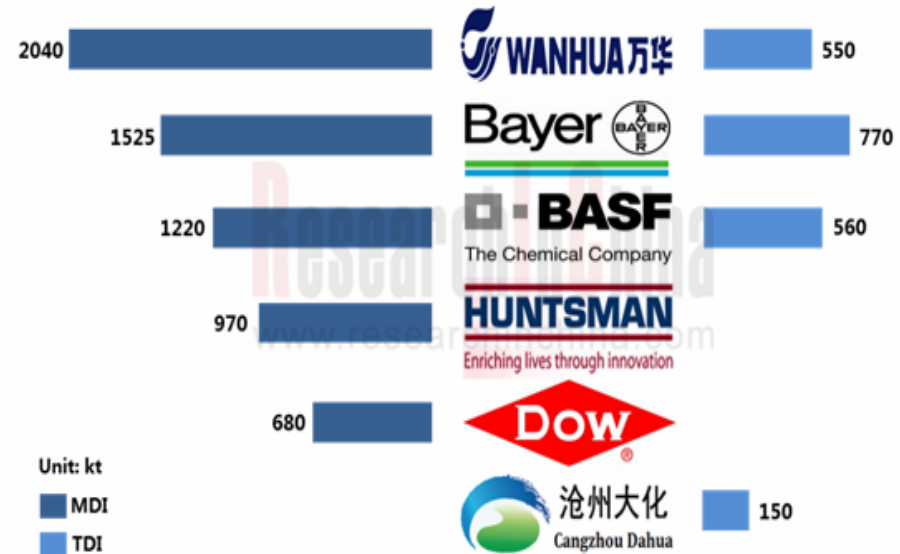
Polyurethane products, consisting mainly of polyurethane rigid foam, flexible foam, elastomer, coatings, adhesives and fiber, find widespread application in fields like construction, automobile, refrigeration, footwear, synthetic leather and fabric.

Global demand for polyurethane products approximated 20.30 million tons in 2014, with new demand largely coming from emerging markets including Asia Pacific and South America. Rigid foam and flexible foam hold the lion's share of demand for polyurethane products in the world, accounting for about 60% of total amount.

China is the world's largest producer and consumer of polyurethane products. China's demand for polyurethane products took up about 45% of global total demand, and is expected to maintain a growth rate of 10% or so over the next couple years, with the share in global demand for polyurethane products rising to 55% by 2017.

Polyurethane rigid foam and flexible foam are the two kinds of products that see fairly rapid growth in demand in China, together accounting for 46% in 2014. Rigid foam is mainly used in refrigeration, building energy conservation, solar thermal insulation, etc.; flexible foam is chiefly applied to automobile, furniture, etc. It is expected the demand for these two products will grow by about 15% and 12% over the next three years, respectively.

Capacity of Major Global MDI/TDI Manufacturers, 2014



Source: Global and China Polyurethane Industry Chain Report, 2014-2017 by ResearchInChina

The upstream materials of polyurethane include three categories, namely, isocyanates (mainly MDI and TDI), polyatomic alcohols (chiefly PPG, PTMEG, BDO and AA) and auxiliaries (principally DMF).

1. MDI

Global MDI capacity was about 7.095 million tons in 2014, with new capacity mainly being 600,000 tons of Wanhua Chemical and 150kt of Bayer Shanghai. Global MDI industry is highly concentrated, with Wanhua Chemical, Bayer and BASF being the top three companies in terms of capacity, together accounting for 67.5% of total global capacity.

Global new MDI capacity will stand at around 1,760 kt during 2015-2018, mostly in China. Main projects include 500kt built by Bayer in Shanghai and 400kt of BASF in Chongqing.

2. TDI

In 2014, global new TDI capacities mainly cover 300kt of Wanhua Chemical and 300,000 tons of Bayer in Germany. Newly-built 300kt plants of BASF in Germany will go into production in the second quarter of 2015.

As of the end of 2014, global top 3 three companies in terms of TDI capacity were Bayer, BASF and Wanhua Chemical, occupying a combined 64.8% share of total global TDI capacity,

3. PPG

In 2014, global polyether polyol capacity totaled about 9.50 million tons, leading to obvious overcapacity and with a capacity utilization rate of just around 70%. Global polyether polyol industry is highly concentrated, dominated by several multinational companies such as Bayer, BASF, Dow Chemical and Shell.

In 2014, there were over 40 polyether polyol producers in China, of which only more than 10 ones boasted 100kt and above plants, including mainly Sinopec Shanghai Gaoqiao Company, CNOOC and Shell Petrochemicals, Shandong Bluestar Dongda Chemical, Nanjing Hongbaoli, etc.

Global and China Polyurethane Industry Chain Report, 2014-2017 by ResearchInChina focuses on the following:

- Supply & demand and forecast in global polyurethane industry;
- Industrial policies, supply & demand, import & export, development trend and forecast in China polyurethane industry;
- Global and China polyurethane rigid foam, flexible foam, elastomer, coatings demand;
- Supply & demand, competitive landscape, import & export, price and forecast in global and China MDI, TDI, PPG industries;
- Demand for polyurethane from building energy efficiency, refrigeration, water heater and automobile industries in China and forecast;
- Operation, polyurethane business and development of 10 global and Chinese polyurethane and raw materials producers.

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