

# Polyurethane Chemicals and Products in EMEA 2012 -Volume 4 End-Use markets

https://marketpublishers.com/r/PBE5F3C2915EN.html

Date: May 2012 Pages: 194 Price: US\$ 5,400.00 (Single User License) ID: PBE5F3C2915EN

## Abstracts

IAL Consultants is completely updating its in- depth market report on Polyurethane Chemicals and Products in Europe, Middle East and Africa. The new report will feature an executive summary. The data will also be presented in an excel format enabling the manipulation and output of data.

Geographical coverage of the report is as follows:

Western Europe (12 countries/regions) Austria, Benelux, France, Germany, Greece, Ireland, Italy, Nordic Region, Portugal, Spain, Switzerland, United Kingdom

Eastern Europe (8 countries/regions) Czech Republic, CIS, Hungary, Poland, Russian Federation, Slovak Republic, Slovenia, Other (Baltic States, Romania, Bulgaria)

Middle East and Africa (10 countries/regions) North Africa, South Africa, West Africa, Iran, Levant, Saudi Arabia, Turkey, UAE, Other GCC, Other MEA

The report provides, by country, consumption estimates for the following polyurethane raw materials:



MDI (MMDI & PMDI)

TDI

Aliphatic Isocyanates

Standard Polyether Polyol

Polyether Graft Copolymer Polyol

Polyester Polyols (aliphatic & aromatic)

PTHF Polyol

Acrylic Polyol

In printed format, this publication is presented in five volumes, containing over 1000 pages of market information, including over 450 tables detailing production of polyurethane products and related raw material consumption.

It also provides, for each country, production data for the following end-use market sectors:

#### Flexible Foam

Polyether & Polyester Slabstock, CMHR Slabstock, Viscoelastic slabstock, Moulded Foam for Transport Seating, Moulded Foam for Furniture, Carpet Backing & Sound Insulation, Semi-rigid and Integral Skin Foam

### **Rigid Foam**

Continuous and Discontinuous Rigid & Flexible-faced Panels, Slabstock, Sprayed Foam, One Component Foam (OCF), Refrigeration & Appliances, In-situ foam & Preinsulated Pipe and Moulded Rigid Foam

### Coatings

Auto OEM, Architectural (interior/exterior), Roof, Tank & Deck, Maintenance, Plastic



(non-automotive) Coatings, Industrial, Auto Refinish, Marine/Offshore, Transport, Wood/Furniture, Textile & Leather and Other

#### Adhesives

Automotive, Construction, Flexible Packaging, Footwear and General Assembly

#### Sealants

Construction, Auto Direct Glazing, Insulated Glazing and Transport

#### Elastomers

Cast, TPUs, Fibres, Microcellular Footwear, Technical Microcellular and Synthetic Leather Resin

#### Binders

Forest Products, Rubber Crumb, Foundry Core

This latest edition of IAL's report aims to provide a detailed and accurate assessment of the polyurethane industry within the EMEA region.



## Contents

## **1. INTRODUCTION**

- 1.1 SCOPE OF THE STUDY
- 1.2 METHODOLOGY
- 1.3 PRODUCTS AND END-USES
- 1.4 UNITS OF VOLUME
- 1.5 FORECASTS

## 2. AUTOMOTIVE

- 2.1 INDUSTRY OVERVIEW
- 2.2 PASSENGER CAR DEMAND
- 2.3 PASSENGER CAR PRODUCTION
- 2.4 COMMERCIAL VEHICLE PRODUCTION
  - 2.4.1 Light Commercial
- 2.4.2 Heavy Goods Vehicles
- 2.4.3 Buses and Coaches
- 2.5 MAJOR USES FOR POLYURETHANES IN THE EUROPEAN AUTOMOTIVE

INDUSTRY

- 2.5.1 Plastics Consumption in the Automotive Industry
- 2.5.2 Total EMEA Production of Polyurethane Used in the Automotive Industry by Enduse
  - 2.5.3 Seating
  - 2.5.4 Instrument Panels
  - 2.5.5 Steering Wheels
  - 2.5.6 Carpet Backing/NVH
  - 2.5.7 Exterior Trim
  - 2.5.8 Window Encapsulation
  - 2.5.9 Other Automotive Interior
  - 2.5.10 Coatings
  - 2.5.11 Direct Glazing
- 2.6 MARKET TRENDS & INFLUENCES
  - 2.6.1 Automotive Sales
  - 2.6.2 Automotive Production
  - 2.6.3 Automotive Moulded Foam
  - 2.6.4 Exterior Trim
  - 2.6.5 Window Encapsulation



- 2.6.6 Coatings, Adhesives & Sealants
- 2.6.7 Sealants and Adhesives
- Automotive Adhesives
- Automotive Direct Glazing

## 3. BUILDING & CONSTRUCTION

- 3.1 INDUSTRY OVERVIEW
  - 3.1.1 Construction Sector Output Europe
  - 3.1.2 New Construction Output Europe
  - 3.1.3 New Residential Construction Output Europe
  - 3.1.4 New Non-Residential Construction Output Europe
  - 3.1.5 New Civil Engineering Construction Europe
- 3.1.6 Construction Sector Output Middle East & Africa
- 3.2 MAJOR USES FOR POLYURETHANES IN THE EUROPEAN CONSTRUCTION INDUSTRY
  - 3.2.1 Introduction
- 3.2.2 Total EMEA Production of Polyurethane Used in the Construction Industry by End-use
  - 3.2.3 Sandwich Panels
  - 3.2.4 Spray Foam
  - **Technical Trends**
  - 3.2.5 One Component Foam (OCF)
  - 3.2.6 Pipe-in-Pipe/Pre-insulated Pipe
  - 3.2.7 Slabstock
  - 3.2.8 Coatings
  - Architectural
  - Maintenance
  - Roof, Tank & Deck
  - 3.2.9 Adhesives & Sealants
  - Insulated Glazing
  - **Construction Sealants**
  - **Construction Adhesives**
  - 3.2.10 Insulated Glazing Sealants
  - 3.2.11 General Construction Adhesives
- 3.2.12 General Construction Sealants
- 3.3 MARKET TRENDS & INFLUENCES
  - 3.3.1 Sandwich Panels
  - **Rigid-faced Panels**



**Flexible-faced Panels** 

- 3.3.2 Sprayed Foam
- 3.3.3 One Component Foam (OCF)
- 3.3.4 Pipe-in-pipe/Pre-insulated Pipe
- 3.3.5 Coatings, Adhesives & Sealants
- Western Europe
- Eastern Europe

Middle East & Africa

## 4. FOOTWEAR

- 4.1 INDUSTRY OVERVIEW
- 4.1.1 Global Footwear Market
- 4.1.2 Global Footwear Production
- 4.2 MAJOR USES FOR POLYURETHANES WITHIN THE FOOTWEAR INDUSTRY IN EMEA
- 4.2.1 Microcellular Elastomer Soling
- 4.2.2 TPU Footwear Components
- 4.2.3 Footwear Adhesives
- 4.3 MARKET TRENDS & INFLUENCES
  - 4.3.1 Elastomers
  - Western Europe
  - Eastern Europe
  - Middle East and Africa
  - 4.3.2 Coatings & Adhesives
  - Western Europe
  - Eastern Europe
  - Middle East and Africa

## 5. FURNITURE & BEDDING

- 5.1 INDUSTRY OVERVIEW
  - 5.1.1 Introduction
  - 5.1.2 The Furniture Industry in EMEA

## 5.2 MAJOR USES OF POLYURETHANES IN THE EUROPEAN FURNITURE &

BEDDING INDUSTRY

- 5.2.1 Introduction
- 5.2.2 Slabstock
- 5.2.3 Moulded Foam



5.2.4 Integral Skin Foam

5.3 MARKET TRENDS AND INFLUENCES

- 5.3.1 Polyether Slabstock
- 5.3.2 Moulded Foam

### 6. REFRIGERATION

- 6.1 INDUSTRY OVERVIEW
  - 6.1.1 Introduction
  - 6.1.2 European Refrigeration Industry
- 6.2 MAJOR APPLICATIONS FOR PU IN THE REFRIGERATION INDUSTRY
- 6.2.1 Total PU Usage by Application
- 6.2.2 Refrigerators & Freezers
- 6.2.3 Cold Storage
- 6.2.4 Refrigerated Transport
- 6.3 MARKET TRENDS AND INFLUENCES
  - 6.3.1 Refrigerators/Freezers



## **List Of Tables**

### LIST OF TABLES

**1. INTRODUCTION 1.1 SCOPE OF THE STUDY 1.2 METHODOLOGY 1.3 PRODUCTS AND END-USES 1.4 UNITS OF VOLUME 1.5 FORECASTS** 2. AUTOMOTIVE 2.1 INDUSTRY OVERVIEW Number of Automotive Assembly & Engine Production Plants in Europe, 2010 Worldwide Vehicle Production, 2010-2011 ('000s) Worldwide Vehicle Production, 2010-2011 ('000s) Top 10 Worldwide Vehicle Manufacturers, 2010 (units) 2.2 PASSENGER CAR DEMAND New Passenger Car Registrations, 2009-2011 (Units) 2.3 PASSENGER CAR PRODUCTION Production of Passenger Cars in EMEA by Country, 2009-2011 (Units) 2.4 COMMERCIAL VEHICLE PRODUCTION EMEA Production of Light Commercial Vehicles by Region, 2009–2011 (Units) EMEA Production of Heavy Goods Vehicles by Country, 2009-2011 (Units) EMEA Production of Buses & Coaches by Country, 2009–2011 (Units) 2.5 MAJOR USES FOR POLYURETHANES IN THE EUROPEAN AUTOMOTIVE INDUSTRY Materials Used in Automobiles Plastics Used in a Typical Car (kg) Total EMEA Production of Polyurethane used in the Automotive Sector by End-use, 2011-2016 (Tonnes & % Growth p.a.) Volume per Seat Component Total EMEA Production of PU Moulded Foam for Passenger Car Seating by Country, 2011-2016 (Tonnes & % Growth p.a.) Total EMEA Production of PU Moulded Foam for Commercial Vehicle Seating by Country, 2011-2016 (Tonnes & % Growth p.a.) Total EMEA Production of PU Moulded Foam for Carpet Backing/NVH Insulation by Country, 2011-2016 (Tonnes & % Growth p.a.) Total EMEA Production of PU Automotive OEM Coatings by Country, 2011-2016 (Tonnes & % Growth p.a.)



Total EMEA Production of PU Automotive Refinish Coatings by Country, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Auto Direct Glazing Sealants by Country, 2011-2016 (Tonnes & % Growth p.a.)

2.6 MARKET TRENDS & INFLUENCES

Maximum VOC Content Limit Values for Vehicle Refinishing Products (g/l)

3. BUILDING & CONSTRUCTION

3.1 INDUSTRY OVERVIEW

Construction Output in the EU – Annual Variation (% change compared with the same quarter of the previous year)

Building Permits (Number of Dwellings) Issued in Europe, 2009-2011 (2005=100)

Total Construction Sector Output in Europe by Type, 2011-2014 (€ Billion)

New Construction Output in Europe by Type, 2011 (€ Billion)

Forecast New Construction Volume by Country, 2011-2014 (€ Billion)

New Residential Building Construction Output, 2011-2014 (€ billion)

New Non-Residential Building Construction Output, 2011-2014 (€ billion)

New Civil Engineering Construction, 2011-2014 (€ Billion)

Iranian Construction Industry Indicators, 2006-2011

Construction Area in Israel 2009-2011 (m2 '000s)

Non-Residential Construction by Area in Israel, 2009-2011 (m2 '000s)

New Buildings and Additions in the Turkish Construction Industry, 2007-2010 (Number of Buildings)

Completed or Partially Completed Buildings in Turkey, 2001-2010 (Number of Buildings) Recorded Building Plans Passed in South Africa, 2010-2011 (R '000s)

Buildings Reported as Completed in South Africa, 2010-2011 (R '000s)

3.2 MAJOR USES FOR POLYURETHANES IN THE EUROPEAN CONSTRUCTION INDUSTRY

Polyurethane Chemicals & Products in EMEA: Volume 4 - Major End-use Markets Total EMEA Production of Polyurethane used in the Construction Sector by Product Type, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Foam for Sandwich Panels by Country, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Sprayed Foam Used for Building & Construction by Country, 2011-2016 (Tonnes & % Growth p.a.)

Typical Physical Properties of an OCF

Total EMEA Production of PU One Component Foam (OCF) by Country, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Foam for Pipe-in-Pipe Insulation by Country, 2011-2016 (Tonnes)



Total EMEA Production of PU Coatings for Construction Applications by Country, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Sealants for Insulated Glazing Applications by Country, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Adhesives for General Construction Applications by Country, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Sealants for General Construction Applications by Country, 2011-2016 (Tonnes & % Growth p.a.)

3.3 MARKET TRENDS & INFLUENCES

Estimated Production of SPF by Region, EMEA, 2011 & 2016 (Tonnes & % Growth p.a.)

Estimated Production & Demand for Polyurethane OCF, Europe, Middle East & Africa, 2011 (No. of Cans)

4. FOOTWEAR

4.1 INDUSTRY OVERVIEW

Structural Data on European Footwear Industry (EU27), 2005-2008

European Trade in Footwear (EU27), 2006-2009 ('000 Pairs)

European Production of Footwear, 2009-2010 (€ '000s)

Global Footwear Production by Region, 2010-2016 (Million Pairs)

World Footwear Soling Material Production by Regions, 2010-2016 (Ktonnes)

World Polyurethane Soling Demand by Regions, 2010-2016 (Ktonnes)

4.2 MAJOR USES FOR POLYURETHANES WITHIN THE FOOTWEAR INDUSTRY IN EMEA

Total EMEA Production of PU Microcellular Systems for Footwear, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Footwear Adhesives, 2011-2016 (Tonnes)

4.3 MARKET TRENDS & INFLUENCES

5. FURNITURE & BEDDING

5.1 INDUSTRY OVERVIEW

Change in European PU Slabstock for Furniture Market, 2006-2010 (% Change p.a.)

European Furniture Industry (EU27) Structural Data, 2005-2008

European Trade in Furniture (EU27), 2006-2010 (€ Millions)

European Production of Upholstered Furniture, 2009-2010 (€ '000s)

European Production of Mattresses, 2009-2010 (€ '000s)

5.2 MAJOR USES OF POLYURETHANES IN THE EUROPEAN FURNITURE & BEDDING INDUSTRY

Total EMEA Production of PU Flexible Foam Used in the Furniture & Bedding Industry by Type, 2011-2016 (Tonnes & % Growth p.a.)

Total EMEA Production of PU Polyether Slabstock Foam for Furniture & Bedding



Applications, 2011-2016 (Tonnes & % Growth p.a.) EMEA Total Viscoelastic Foam Production, 2011-2016 (Tonnes and % Growth p.a.) Total EMEA Production of PU Flexible Moulded Foam for Furniture & Bedding Applications, 2011-2016 (Tonnes & % Growth p.a.) Total EMEA Production of PU Integral Skin Foam for Furniture Applications, 2011-2016 (Tonnes & % Growth p.a.) **5.3 MARKET TRENDS AND INFLUENCES** 6. REFRIGERATION 6.1 INDUSTRY OVERVIEW Sales of Refrigerators and Freezers in France, 2009-2011 (Units, %) Sales of Refrigerators and Freezers in Spain, 2009-2011 (Units & %) Sales of Refrigerators and Freezers in Germany, 2008-2010 (€ millions & %) Production of Refrigerators & Freezers in Europe (EU27), 2010 (€ '000s) Production of Refrigerators & Freezers in Europe (EU27), 2009 (€ '000s) Production & Sales of Refrigerators in Turkey ('000 Units) 6.2 MAJOR APPLICATIONS FOR PU IN THE REFRIGERATION INDUSTRY Total EMEA Production of PU Rigid Foam Used in the Manufacture of Refrigerators & Freezers, 2011-2016 (Tonnes & % Growth p.a.) Polyurethane Chemicals & Products in EMEA: Volume 4 - Major End-use Markets 6.3 MARKET TRENDS AND INFLUENCES



### I would like to order

Product name: Polyurethane Chemicals and Products in EMEA 2012 - Volume 4 End-Use markets Product link: <u>https://marketpublishers.com/r/PBE5F3C2915EN.html</u>

Price: US\$ 5,400.00 (Single User License / Electronic Delivery) If you want to order Corporate License or Hard Copy, please, contact our Customer Service: <u>info@marketpublishers.com</u>

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <u>https://marketpublishers.com/r/PBE5F3C2915EN.html</u>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name: Last name: Email: Company: Address: City: Zip code: Country: Tel: Fax: Your message:

\*\*All fields are required

Custumer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <u>https://marketpublishers.com/docs/terms.html</u>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970