

Bio-Polyamide, Specialty Polyamide & Precursors Market by Type (PA 6, PA 66, PA 10, PA 11, PA 12 & Others), by Precursor (CPL, ADA & HDMA), by Material (Fiber & Plastics) & Application (Textile, Automotive, E&E & Others) - Global Trends & Forecasts to 2019

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Abstracts

The report covers the important global polyamide markets, such as polyamide 6, polyamide 66, polyamide 10, polyamide 11, polyamide 13, and others. It further divides the market on the basis of materials, applications, geography, and its precursors. The market data for these types is given with respect to volume (thousand tons) and value (\$Million). The market value of polyamide was estimated to be \$29, 454.9 million in 2012 and is projected to grow with a CAGR of about 5.5% from 2014 to 2019. The data mentioned in the report are based on the global demand for the polyamide.

The total market for global polyamide has been analyzed based on the Porter's five forces model. This gives an idea about the current proceedings in the industry at the commercial level. The study provides the value chain analysis with respect to polyamide raw materials, manufacturers, and end uses. The value chain describes the key contributors to the materials market at different stages from product development to end use. It represents the top players which are contributing to the global polyamide industry.

The impact of different market factors, such as drivers, restraints, and opportunities is also illustrated in the report. This gives an idea about the key drivers such as automotive industry – weight reduction in vehicles, growth in electrical & electronics applications, growth of emerging economies; and restraints such as moisture absorption

resulting in degradation of properties, and current economic condition of Europe. The economic slowdown in Europe and U.S. also affected the economy of other developed countries that are of key importance for the commercial success of new materials and its end-user market.

The global polyamide market is also classified based on different applications. The important applications include textiles, industrial, and carpet filament, staple fiber automotive, film & coating, industrial/machinery, electrical & electronics, consumer goods, appliances, wires & cables, and others. The automotive and consumer goods & appliances are expected to show rapid growth in the future.

The key companies in this market are BASF SE (Germany), Li Peng Enterprise Co. (China), Formosa Group (Taiwan), Honeywell International Inc. (U.S.), and Royal DSM N.V. (The Netherlands) are among the important manufacturers of polyamide 6; while Ascend Performance Materials Inc. (U.S.), Invista (U.S.), E. I. du Pont de Nemours and Company (U.S.), Solvay/Rhodia (France), Shenma Industrial Co. Ltd. (China), BASF SE (Germany), Radici Group (Italy), and others are the most active and major players of the polyamide 66 market. These companies are consistently focusing on expanding their production capacity to achieve a competitive advantage and thereby serving the customers more effectively. Investments in R&D, followed by expansions were the most preferred strategies by the top players in the year 2012 that are driving the demand of polyamide. Their strategy to capture the market in developing economies includes expansions and agreements.

The Asia-Pacific region emerged to be the driving factor for this market, contributing for about 41% of the global demand in terms of consumption in 2012. China is the leading country in the consumption of polyamide, due to the increased demand from the automotive and packaging industries. The important emerging economies such as Brazil, India, Russia, etc. are further lined up for a brighter future in this market.

The report also presents a competitive landscape covering different strategies and developments such as mergers & acquisitions, expansions, and agreements undertaken by the leading polyamide companies in the past few years. Furthermore, different polyamide market participants are also profiled in the report.

Scope of the report

The report segments the global polyamide market as:

The global polyamide market has been covered in detail in this report. In order to provide an all-round picture, the current market demand and forecasts have also been included.

On the basis of types:

Polyamide 6

Polyamide 66

Polyamide 10

Polyamide 11

Polyamide 12

Others

On the basis of materials:

Fibers

Engineering plastics

On the basis of applications:

Fiber:

Textile filament

Industrial filament

Carpet filament

Staple fibers

Engineering Plastics:

Automotive

Film & coating

Industrial/Machinery

Electrical & electronics

Consumer goods

Appliances

Wires & cables

Others

On the basis of geography:

North America

Europe

Asia-Pacific

ROW

On the basis of precursors:

Caprolactam (CPL)

Adipic Acid (APA)

Hexamethylenediamine (HDMA)

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About

Automotive & Electrical Industry—Major Markets

The market share for polyamide 6 was estimated to be about XX% and combining polyamide 6 and polyamide 66 accounted for about XX% for the year 2012. For bio-based and specialty polyamide (PA 10, PA 11, and PA 12) the market share was estimated for about XX%.

In North America, the demand for polyamide 66 was estimated more than polyamide 6 with a market share of about XX%. The market share of polyamide 6 is estimated to be about XX% in 2012.

In Europe, the polyamide 6 market dominates with a market share of about XX%. The market share for bio-based and specialty polyamide was about XX%.

Polyamide & Its Precursors Capacity Share Analysis

Major players of the polyamide market such as BASF, DuPont, Honeywell, and others manufacture polyamide, which is likely to increase the captive consumption of the precursor produced in the plant and hence help EBIT margin of the company to improve. Whereas company such as DSM, export their produced precursors to China and even supply to the small players within Europe.

The production capacities of polyamide 6 is majorly in XX with a market share of about XX%; whereas, for polyamide 66, XX was found to be a major producer with a market share of about XX%.

Polyamide 6 Capacity Share Analysis, 2012

The global polyamide 6 market is a fragmented one with dominance by few manufacturers. XX is the market leader with XX% share. The other companies following XX in terms of dominance include XX, XX, XX, and XX. XX is the market leader in the specialty and bio-based polyamide. XX and XX are close competitors in the upcoming segments of different bio-based polyamide.

BASF leads the market with its long term supply contracts and new innovative products for the automotive sector which is the largest application for polyamide. The company is

building a compounding plant for engineering plastics Ultramid (polyamide) in Yesan, Chung Nam Province, South Korea. This new plant is expected to begin construction by first half of 2014 and operations from the end of 2015.

Bio-Based Polyamide & Specialty Polyamide

Bio-based polyamide is formed by two methods, by polycondensation of amino carbonic acids or by ring-opening lactum polymerization. Different fillers can be used to enhance the strength of the bio-based polyamide.

These differ vastly in terms of its properties. Polyamide grades such as PA 1010 and PA 610 have properties which make these suitable to be used instead of PA 6 and PA 12.

Renewable polymer industry is growing rapidly and is estimated reach nearly XX% by 2020. Europe alone manufactures more than XX tons of renewable products. Renewable polymers are useful in sectors such as textiles, foams, and packaging. Compared to regular polyamide bio-based polyamide have same or better barrier properties. It is suitable for higher temperature range and has better elongation properties. Hence, these bio-based films are produced in food packaging, medical, aviation, and shipping applications. It has lower carbon footprint compared to other standard polyamide.

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