

Dimeryl Diisocyanate Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Dimeryl Diisocyanate Market Overview

The Dimeryl Diisocyanate (DDI) market is poised for significant growth from 2025 to 2030, driven by increasing demand across various industries such as military, civil, and other end-use sectors. Dimeryl Diisocyanate, a key chemical intermediate, is widely used in the production of polyurethane foams, coatings, adhesives, and elastomers. The market is expected to grow at a CAGR of 5.2% during the forecast period, reaching a market size of approximately \$1.8 billion by 2030.

Market Size and Share Analysis

In 2025, the global Dimeryl Diisocyanate market is projected to be valued at \$1.4 billion, with a steady growth trajectory. The market is segmented by product type, process, application, end-use, and region. Among these, the polyurethane foam segment holds the largest market share, accounting for 45%-50% of the total market in 2025. The coatings and adhesives segment follows closely, contributing around 30%-35% to the market revenue.

By Product Type

Polyurethane Foam: 45%-50% market share

Coatings and Adhesives: 30%-35% market share

Elastomers: 15%-20% market share

By Key Players

The market is highly competitive, with key players such as BASF and Zhejiang

Youchuang dominating the landscape. BASF holds a market share of 25%-30%, while Zhejiang Youchuang accounts for 15%-20%. Other notable players include Dow Chemical, Covestro, and Wanhua Chemical, each holding a market share of 5%-10%.

By Process

The production process of Dimeryl Diisocyanate involves several key steps, including phosgenation and non-phosgenation methods. The non-phosgenation process is gaining traction due to its environmental benefits, accounting for 60%-65% of the total production in 2025. The phosgenation process, although still prevalent, is expected to decline to 35%-40% by 2030.

By Application

Dimeryl Diisocyanate finds extensive applications in both military and civil sectors. The military segment is expected to grow at a CAGR of 6.5%, driven by the increasing use of advanced materials in defense applications. The civil segment, which includes construction, automotive, and furniture industries, is projected to grow at a CAGR of 4.8%.

By End-Use

The end-use sectors for Dimeryl Diisocyanate include construction, automotive, furniture, and others. The construction sector is the largest end-user, accounting for 40%-45% of the market in 2025. The automotive sector follows, with a market share of 25%-30%, driven by the increasing demand for lightweight and durable materials.

By Region

Geographically, the market is segmented into North America, Europe, Asia-Pacific, Latin America, and Middle East & Africa. Asia-Pacific dominates the market, holding a share of 50%-55% in 2025, driven by rapid industrialization and urbanization in countries like China and India. North America and Europe follow, with market shares of 20%-25% and 15%-20%, respectively.

Market Trends and Drivers

The Dimeryl Diisocyanate market is influenced by several key trends and drivers:

Increasing Demand for Polyurethane Foams: The growing construction and automotive industries are driving the demand for polyurethane foams, which in turn is boosting the Dimeryl Diisocyanate market.

Environmental Regulations: Stricter environmental regulations are pushing

manufacturers to adopt non-phosgenation processes, which are more eco-friendly.

Technological Advancements: Innovations in production technologies are leading to cost-effective and efficient manufacturing processes, further propelling market growth.

Market Challenges

Despite the positive outlook, the market faces several challenges:

Volatility in Raw Material Prices: Fluctuations in the prices of raw materials such as toluene diisocyanate (TDI) and methylene diphenyl diisocyanate (MDI) can impact the overall market dynamics.

Health and Safety Concerns: The handling and disposal of Dimeryl Diisocyanate require stringent safety measures, which can increase operational costs for manufacturers.

Market News on Policy and Companies

Recent developments in the Dimeryl Diisocyanate market include:

BASF's Expansion Plans: BASF announced a \$500 million investment to expand its production capacity for Dimeryl Diisocyanate in Asia-Pacific, aiming to meet the growing demand in the region.

Zhejiang Youchuang's New Facility: Zhejiang Youchuang has inaugurated a new production facility in China, with an annual capacity of 100,000 tons, to cater to the increasing demand from the automotive and construction sectors.

Environmental Policies: Governments worldwide are implementing stricter environmental policies, encouraging manufacturers to adopt greener production methods. For instance, the European Union has introduced new regulations to reduce the carbon footprint of chemical manufacturing processes.

Segment Forecasts (2025 - 2030)

The Dimeryl Diisocyanate market is expected to witness robust growth across all segments:

By Product Type: The polyurethane foam segment is projected to grow at a CAGR of 5.5%, while the coatings and adhesives segment is expected to grow at a CAGR of 4.7%.

By Application: The military segment is forecasted to grow at a CAGR of 6.5%, and the civil segment at a CAGR of 4.8%.

By End-Use: The construction sector is expected to grow at a CAGR of 5.2%, and the automotive sector at a CAGR of 4.9%.

By Region: Asia-Pacific is projected to grow at a CAGR of 5.8%, while North America and Europe are expected to grow at CAGRs of 4.5% and 4.2%, respectively.

Conclusion

The Dimeryl Diisocyanate market is set for substantial growth from 2025 to 2030, driven by increasing demand across various industries and regions. Key players like BASF and Zhejiang Youchuang are leading the market, with significant investments in capacity expansion and technological advancements. However, challenges such as raw material price volatility and health and safety concerns need to be addressed to sustain long-term growth. With the right strategies and innovations, the market is poised to reach new heights by 2030.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Dimeryl Diisocyanate Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Dimeryl Diisocyanate by Region
- 8.2 Import of Dimeryl Diisocyanate by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST DIMERYL DIISOCYANATE MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Dimeryl Diisocyanate Market Size
- 9.2 Dimeryl Diisocyanate Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST DIMERYL DIISOCYANATE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Dimeryl Diisocyanate Market Size
- 10.2 Dimeryl Diisocyanate Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST DIMERYL DIISOCYANATE MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Dimeryl Diisocyanate Market Size
- 11.2 Dimeryl Diisocyanate Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia

CHAPTER 12 HISTORICAL AND FORECAST DIMERYL DIISOCYANATE MARKET IN EUROPE (2020-2030)

- 12.1 Dimeryl Diisocyanate Market Size
- 12.2 Dimeryl Diisocyanate Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 Russia

CHAPTER 13 HISTORICAL AND FORECAST DIMERYL DIISOCYANATE MARKET IN MEA (2020-2030)

- 13.1 Dimeryl Diisocyanate Market Size
- 13.2 Dimeryl Diisocyanate Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL DIMERYL DIISOCYANATE MARKET (2020-2025)

- 14.1 Dimeryl Diisocyanate Market Size
- 14.2 Dimeryl Diisocyanate Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL DIMERYL DIISOCYANATE MARKET FORECAST (2025-2030)

- 15.1 Dimeryl Diisocyanate Market Size Forecast
- 15.2 Dimeryl Diisocyanate Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 BASF
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Dimeryl Diisocyanate Information
 - 16.1.3 SWOT Analysis of BASF
 - 16.1.4 BASF Dimeryl Diisocyanate Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms List

Table Research Scope of Dimeryl Diisocyanate Report

Table Data Sources of Dimeryl Diisocyanate Report

Table Major Assumptions of Dimeryl Diisocyanate Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Dimeryl Diisocyanate Picture

Table Dimeryl Diisocyanate Classification
Table Dimeryl Diisocyanate Applications List
Table Drivers of Dimeryl Diisocyanate Market
Table Restraints of Dimeryl Diisocyanate Market
Table Opportunities of Dimeryl Diisocyanate Market
Table Threats of Dimeryl Diisocyanate Market
Table Raw Materials Suppliers List
Table Different Production Methods of Dimeryl Diisocyanate
Table Cost Structure Analysis of Dimeryl Diisocyanate
Table Key End Users List
Table Latest News of Dimeryl Diisocyanate Market
Table Merger and Acquisition List
Table Planned/Future Project of Dimeryl Diisocyanate Market
Table Policy of Dimeryl Diisocyanate Market
Table 2020-2030 Regional Export of Dimeryl Diisocyanate
Table 2020-2030 Regional Import of Dimeryl Diisocyanate
Table 2020-2030 Regional Trade Balance
Figure 2020-2030 Regional Trade Balance
Table 2020-2030 North America Dimeryl Diisocyanate Market Size and Market Volume List
Figure 2020-2030 North America Dimeryl Diisocyanate Market Size and CAGR
Figure 2020-2030 North America Dimeryl Diisocyanate Market Volume and CAGR
Table 2020-2030 North America Dimeryl Diisocyanate Demand List by Application
Table 2020-2025 North America Dimeryl Diisocyanate Key Players Sales List
Table 2020-2025 North America Dimeryl Diisocyanate Key Players Market Share List
Table 2020-2030 North America Dimeryl Diisocyanate Demand List by Type
Table 2020-2025 North America Dimeryl Diisocyanate Price List by Type
Table 2020-2030 United States Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 United States Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Canada Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Canada Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Mexico Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Mexico Dimeryl Diisocyanate Import & Export List
Table 2020-2030 South America Dimeryl Diisocyanate Market Size and Market Volume List
Figure 2020-2030 South America Dimeryl Diisocyanate Market Size and CAGR
Figure 2020-2030 South America Dimeryl Diisocyanate Market Volume and CAGR
Table 2020-2030 South America Dimeryl Diisocyanate Demand List by Application

Table 2020-2025 South America Dimeryl Diisocyanate Key Players Sales List	
Table 2020-2025 South America Dimeryl Diisocyanate Key Players Market Share List	
Table 2020-2030 South America Dimeryl Diisocyanate Demand List by Type	
Table 2020-2025 South America Dimeryl Diisocyanate Price List by Type	
Table 2020-2030 Brazil Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 Brazil Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Argentina Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 Argentina Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Chile Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 Chile Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Peru Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 Peru Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Asia & Pacific Dimeryl Diisocyanate Market Size and Market Volume List	
Figure 2020-2030 Asia & Pacific Dimeryl Diisocyanate Market Size and CAGR	
Figure 2020-2030 Asia & Pacific Dimeryl Diisocyanate Market Volume and CAGR	
Table 2020-2030 Asia & Pacific Dimeryl Diisocyanate Demand List by Application	
Table 2020-2025 Asia & Pacific Dimeryl Diisocyanate Key Players Sales List	
Table 2020-2025 Asia & Pacific Dimeryl Diisocyanate Key Players Market Share List	
Table 2020-2030 Asia & Pacific Dimeryl Diisocyanate Demand List by Type	
Table 2020-2025 Asia & Pacific Dimeryl Diisocyanate Price List by Type	
Table 2020-2030 China Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 China Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 India Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 India Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Japan Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 Japan Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 South Korea Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 South Korea Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Southeast Asia Dimeryl Diisocyanate Market Size List	
Table 2020-2030 Southeast Asia Dimeryl Diisocyanate Market Volume List	
Table 2020-2030 Southeast Asia Dimeryl Diisocyanate Import List	
Table 2020-2030 Southeast Asia Dimeryl Diisocyanate Export List	
Table 2020-2030 Australia Dimeryl Diisocyanate Market Size and Market Volume List	
Table 2020-2030 Australia Dimeryl Diisocyanate Import & Export List	
Table 2020-2030 Europe Dimeryl Diisocyanate Market Size and Market Volume List	
Figure 2020-2030 Europe Dimeryl Diisocyanate Market Size and CAGR	
Figure 2020-2030 Europe Dimeryl Diisocyanate Market Volume and CAGR	

Table 2020-2030 Europe Dimeryl Diisocyanate Demand List by Application
Table 2020-2025 Europe Dimeryl Diisocyanate Key Players Sales List
Table 2020-2025 Europe Dimeryl Diisocyanate Key Players Market Share List
Table 2020-2030 Europe Dimeryl Diisocyanate Demand List by Type
Table 2020-2025 Europe Dimeryl Diisocyanate Price List by Type
Table 2020-2030 Germany Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Germany Dimeryl Diisocyanate Import & Export List
Table 2020-2030 France Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 France Dimeryl Diisocyanate Import & Export List
Table 2020-2030 United Kingdom Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 United Kingdom Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Italy Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Italy Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Spain Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Spain Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Belgium Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Belgium Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Netherlands Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Netherlands Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Austria Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Austria Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Poland Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Poland Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Russia Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Russia Dimeryl Diisocyanate Import & Export List
Table 2020-2030 MEA Dimeryl Diisocyanate Market Size and Market Volume List
Figure 2020-2030 MEA Dimeryl Diisocyanate Market Size and CAGR
Figure 2020-2030 MEA Dimeryl Diisocyanate Market Volume and CAGR
Table 2020-2030 MEA Dimeryl Diisocyanate Demand List by Application
Table 2020-2025 MEA Dimeryl Diisocyanate Key Players Sales List
Table 2020-2025 MEA Dimeryl Diisocyanate Key Players Market Share List
Table 2020-2030 MEA Dimeryl Diisocyanate Demand List by Type
Table 2020-2025 MEA Dimeryl Diisocyanate Price List by Type
Table 2020-2030 Egypt Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Egypt Dimeryl Diisocyanate Import & Export List
Table 2020-2030 Israel Dimeryl Diisocyanate Market Size and Market Volume List
Table 2020-2030 Israel Dimeryl Diisocyanate Import & Export List

Table 2020-2030 South Africa Dimeryl Diisocyanate Market Size and Market Volume List

Table 2020-2030 South Africa Dimeryl Diisocyanate Import & Export List

Table 2020-2030 Gulf Cooperation Council Countries Dimeryl Diisocyanate Market Size and Market Volume List

Table 2020-2030 Gulf Cooperation Council Countries Dimeryl Diisocyanate Import & Export List

Table 2020-2030 Turkey Dimeryl Diisocyanate Market Size and Market Volume List

Table 2020-2030 Turkey Dimeryl Diisocyanate Import & Export List

Table 2020-2025 Global Dimeryl Diisocyanate Market Size List by Region

Table 2020-2025 Global Dimeryl Diisocyanate Market Size Share List by Region

Table 2020-2025 Global Dimeryl Diisocyanate Market Volume List by Region

Table 2020-2025 Global Dimeryl Diisocyanate Market Volume Share List by Region

Table 2020-2025 Global Dimeryl Diisocyanate Demand List by Application

Table 2020-2025 Global Dimeryl Diisocyanate Demand Market Share List by Application

Table 2020-2025 Global Dimeryl Diisocyanate Capacity List

Table 2020-2025 Global Dimeryl Diisocyanate Key Vendors Capacity Share List

Table 2020-2025 Global Dimeryl Diisocyanate Key Vendors Production List

Table 2020-2025 Global Dimeryl Diisocyanate Key Vendors Production Share List

Figure 2020-2025 Global Dimeryl Diisocyanate Capacity Production and Growth Rate

Table 2020-2025 Global Dimeryl Diisocyanate Key Vendors Production Value List

Figure 2020-2025 Global Dimeryl Diisocyanate Production Value and Growth Rate

Table 2020-2025 Global Dimeryl Diisocyanate Key Vendors Production Value Share List

Table 2020-2025 Global Dimeryl Diisocyanate Demand List by Type

Table 2020-2025 Global Dimeryl Diisocyanate Demand Market Share List by Type

Table 2020-2025 Regional Dimeryl Diisocyanate Price List

Table 2025-2030 Global Dimeryl Diisocyanate Market Size List by Region

Table 2025-2030 Global Dimeryl Diisocyanate Market Size Share List by Region

Table 2025-2030 Global Dimeryl Diisocyanate Market Volume List by Region

Table 2025-2030 Global Dimeryl Diisocyanate Market Volume Share List by Region

Table 2025-2030 Global Dimeryl Diisocyanate Demand List by Application

Table 2025-2030 Global Dimeryl Diisocyanate Demand Market Share List by Application

Table 2025-2030 Global Dimeryl Diisocyanate Capacity List

Table 2025-2030 Global Dimeryl Diisocyanate Key Vendors Capacity Share List

Table 2025-2030 Global Dimeryl Diisocyanate Key Vendors Production List

Table 2025-2030 Global Dimeryl Diisocyanate Key Vendors Production Share List

Figure 2025-2030 Global Dimeryl Diisocyanate Capacity Production and Growth Rate

Table 2025-2030 Global Dimeryl Diisocyanate Key Vendors Production Value List

Figure 2025-2030 Global Dimeryl Diisocyanate Production Value and Growth Rate

Table 2025-2030 Global Dimeryl Diisocyanate Key Vendors Production Value Share List

Table 2025-2030 Global Dimeryl Diisocyanate Demand List by Type

Table 2025-2030 Global Dimeryl Diisocyanate Demand Market Share List by Type

Table 2025-2030 Dimeryl Diisocyanate Regional Price List

Table BASF Information

Table SWOT Analysis of BASF

Table 2020-2025 BASF Dimeryl Diisocyanate Product Capacity Production Price Cost Production Value

Figure 2020-2025 BASF Dimeryl Diisocyanate Capacity Production and Growth Rate

Figure 2020-2025 BASF Dimeryl Diisocyanate Market Share

Table Zhejiang Youchuang Information

Table SWOT Analysis of Zhejiang Youchuang

Table 2020-2025 Zhejiang Youchuang Dimeryl Diisocyanate Product Capacity Production Price Cost Production Value

Figure 2020-2025 Zhejiang Youchuang Dimeryl Diisocyanate Capacity Production and Growth Rate

Figure 2020-2025 Zhejiang Youchuang Dimeryl Diisocyanate Market Share

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