

Global and China Polyurethane Industry Chain Report, 2013-2016

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Abstracts

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:

20120114.gif Supply, demand, product structure and geographical distribution of the global polyurethane industry;

20120114.gif Industrial policies, supply, demand, product structure, import, export and development trends of China polyurethane industry;

20120114.gif Demand and consumption structure of global and Chinese polyurethane rigid foam, soft foam, elastomer, paint and other market segments;

20120114.gif Capacity, competition patterns, import, export and prices of global and Chinese MDI, TDI, PPG and other industries;

20120114.gif The demand of Chinese building energy saving, refrigeration, water heater and automobile industries for polyurethane;

20120114.gif Operation and polyurethane business of 10 global and Chinese polyurethane and raw materials production enterprises.

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