

The Polyurethane Industry in China 2002

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Introduction

The polyurethane industry in China continues to develop in terms of size and sophistication in order to meet growing consumer and industrial demands. Total production of polyurethane has increased from only 7,000 tonnes in 1982, to an estimated 990,000 tonnes in 2000. With an economic downturn hitting the American markets, Japan in recession and a slowdown in consumer demand forecast for Europe, China is seen as the major engine for global economic growth over the next decade. The polyurethane industry is no exception in its enthusiasm to develop China into the single largest global market for its raw materials; however, the information required for market development and investment is fragmented and difficult to validate.

IAL Consultants is publishing an analysis of the Chinese polyurethane industry during 2002. The research will be presented in a single-volume market report based upon a detailed programme of telephone and personal interviews with industry experts based in China and other parts of Asia. Following publication, smaller sections will also be available for purchase, in addition to the complete report.

A separate directory of polyurethane producers based in China will be published, containing short profiles and contact details for many of the major manufacturers of polyurethane products.

The report builds upon previous reports published by IAL Consultants in 1997 and 1999 on the Polyurethane Industry in the Asia-Pacific region.

Scope of Study

The report will provide consumption estimates for the following polyurethane raw materials:

Raw Materials

- MDI (monomeric and polymeric)
- TDI
- Aliphatic Isocyanates
- Polyether Polyols
- Polyester Polyols

The report will provide production data and PU raw material consumption data for the formulated products sector and production data for the end-use market sector:

Formulated Products

- Flexible Foam
- Rigid Foam
- Coatings
- Adhesives
- Sealants
- Elastomers

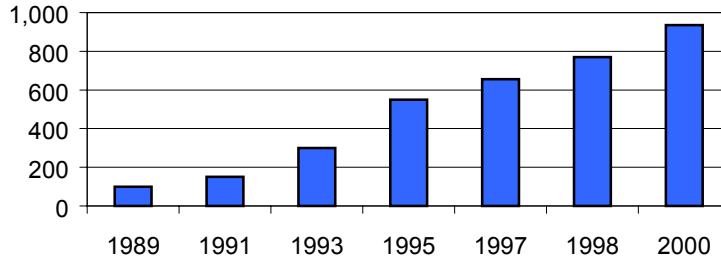
End-use Markets

- Construction
- Refrigeration
- Automotive
- Furniture & Bedding
- Footwear

The directory of PU producers will include the following (where possible) for each company listed:

- Contact details
- Key Activities/Products
- Key Personnel
- Ownership
- No. of Employees
- Production Capacity

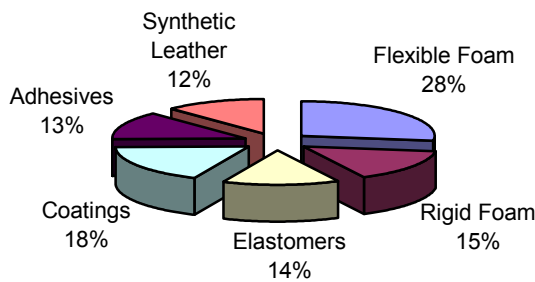
PU Production in China, 1989-2000
(Kilo Tonnes)



Source: IAL Consultants

The largest part of the Chinese polyurethane market is the production of flexible foam, accounting for around 30% of the total market. With an estimated 1,500 producers of flexible slabstock the market is difficult to track. Virtually no polyester slabstock is produced in the country due to technical difficulties, although production is expected to start up within the next 12-18 months due to the high demand in disposable diapers, filters, household sponges and garments. In addition there is a growing demand for HR foams to improve the image and durability of upholstered furniture used in the commercial sector.

PU Production in China, 2000 (Tonnes)

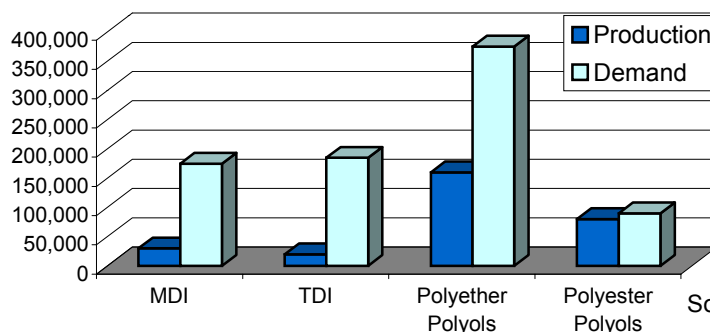


Total Production = 990,000 tonnes

Source: IAL Consultants

In the above chart, elastomers includes footwear, cast, fibres and TPU and solvents. The synthetic leather figure also includes solvents. In order to sustain the development of the polyurethane industry, improvements in accessibility to quality raw materials has been the main focus of the major raw materials manufacturers. The following chart illustrates the progress made by domestic producers in meeting demand.

Raw Material Production & Demand in China, 2000
(Tonnes)



Source: IAL Consultants

Objectives of the Study

The primary aim will be to provide a comprehensive market analysis and industry review for use by commercial personnel with interest or involvement in the Chinese polyurethanes industry. The report will include an executive summary, covering the following:

- Raw material supply chain
- Raw material consumption by product type
- Production of polyurethane by product type and major province
- Supply/demand analysis
- Market forecasts
- Market structure
- Major players/key customers profiles
- Key market drivers
- Future market development vs. GDP
- Potential competition from other materials and other manufacturing countries in Asia
- Major technical developments

PU Products

The report will concentrate on the production of the following polyurethane products:

Flexible Foam

- Polyether Slabstock
- Polyester Slabstock
- Moulded Foam for Transport Seating
- Moulded Foam for Other Applications
- Carpet Backing & Sound Insulation
- Semi-rigid Foam
- Integral Skin Foam

Coatings

- Automotive OEM - metal and plastic substrates
- Architectural & Maintenance - interior & exterior
- Industrial
- Transport
- Wood Furniture Coatings & Varnishes
- Textile and Leather Coatings

Sealants

- Construction
- Direct Glazing
- Insulated Glazing

Rigid Foam

- Construction Panels
- Slabstock
- Sprayed Foam
- OCF (one component foam)
- Refrigeration Foam
- In-situ Foam

Adhesives

- Automotive
- Construction
- Woodworking
- Footwear
- Packaging

Elastomers

- Cast Elastomers - hot & cold cure
- Spandex Fibres
- Microcellular- Footwear
- Synthetic Leather Resin
- Technical - tyres, filters, shock absorbers

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