

Fully Updated and Extended Market Study

# Polyurethane Chemicals and Products in Asia-Pacific 1998-2003

Published: November 1999

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## Background:

IAL Consultants has fully updated and extended this new edition of our report on the market for 'Polyurethane Chemicals and Products in Asia-Pacific'. Following the economic crisis experienced by most of the countries in this region, this report aims to provide a detailed overview of the polyurethane industry, providing figures for 1998 consumption of raw materials as well as forecasts for 2003.

The information contained in this report has been gathered during 1999, through a series of discussions and interviews with key players in the Asia-Pacific PU market and a thorough review of all on-line and published sources.

## Countries Covered:

- Australia
- China
- India
- Indonesia
- Japan
- Korea
- Malaysia
- Pakistan
- The Philippines
- Singapore
- Taiwan
- Thailand
- Others (Cambodia, Vietnam, Myanmar, New Zealand)

## Products Covered:

- Raw Materials
  - Isocyanates (MDI, TDI, Aliphatics)
  - Polyols (Polyester, Polyether)
  - Isocyanate and Polyol Precursors
- Rigid Foam
  - Sandwich Panels
  - Refrigeration (Domestic & Commercial)
  - Sprayed Foam
  - Pipe-in-pipe Insulation
  - Slabstock
  - Other Applications

- Flexible Foam
  - Slabstock (Polyether & Polyester)
  - Moulded Foam (Integral Skin, Semi-rigid, Automotive Seating)
- Elastomers
  - Cast
  - TPU
  - Microcellular
  - Other
- Coatings
- Adhesives & Sealants
- Binders
- Synthetic Leather

## Trends and Issues:

- Despite falling consumption of raw materials in the region during 1998, demand has increased dramatically during the first half of 1999
- Total PU production amounted to around 2.0 million tonnes in 1998
- China remains the pivotal market within the region, with growth forecast at 4-5% per annum
- Political instability, natural disasters and continued economic uncertainty are all likely to impact the development of the polyurethane industry over the next 5 years at least
- Although the majority of Asia's huge population is unlikely to afford polyurethane products in the short to medium term, they do represent a large, low cost skilled, workforce to leading global PU processors.
- Continued urbanisation of the huge rural populations is expected to continue and drive demand for more consumer products

## This reports provides:

- By product type, consumption estimates for the major PU raw materials
- Raw material manufacturer's production capacities
- Listings of over 450 PU producers by product type
- Data on 5 main end-use markets – Transport, Refrigeration, Footwear, Building & Construction and Furniture & Bedding
- Market trends & influences affecting production of PU and related end-use markets
- PU production summaries by country
- Directory of raw material suppliers by type

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