



# World Thermoplastic Elastomers

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Industry Study with Forecasts for **2013 & 2018**

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*Global TPE sales will remain heavily concentrated in the developed areas, particularly for higher performance materials such as TPVs and copolyester elastomers (COPEs).*

## Global demand to rise 6% annually through 2013

World demand for thermoplastic elastomers (TPEs) is forecast to rise 6.0 percent per year through 2013 to 4.2 million metric tons. Gains will be exaggerated to some extent by the fact that growth will be arising from a weak, recessionary 2008, particularly in many major developed countries. China will account for 42 percent of new TPE demand between 2008 and 2013. In 2008, China accounted for 32 percent of world TPE demand, and an even higher 42 percent of global styrenic block copolymer (SBC) demand, indicative of the country's dominance in the manufacturing of SBC consuming products such as footwear. Although smaller than China in overall TPE and SBC demand, the US was the world's leading national market for thermoplastic polyolefins (TPOs) and thermoplastic vulcanizates (TPVs) in 2008, due to these products' higher penetration rates in motor vehicles produced in the US.

Excluding China, global TPE sales will remain heavily concentrated in the developed markets of the US, Western Europe and Japan, particularly for higher performance materials such as TPVs and copolyester elastomers (COPEs). Most developing markets focus on low cost SBCs due to their existing positions in styrene-butadiene and polybutadiene rubber, but some such as China are also diversifying into thermoplastic polyurethanes (TPUs) and, to a lesser extent, TPOs. Growth prospects through 2013

## World Thermoplastic Elastomer Demand, 2008

(3.1 million metric tons)

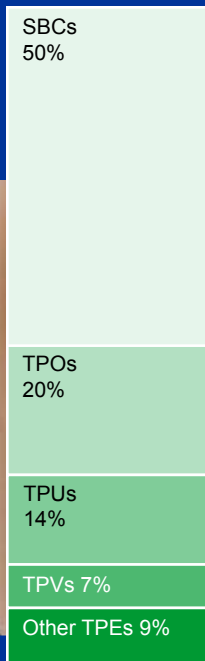


photo: NewAge Industries, Inc.

will be strongest in developing nations such as the BRIC countries of Brazil, Russia, India and China. Some developed nations such as Canada will see strong growth in their TPE sectors due to a healthy projected recovery in their motor vehicle industries from heavy declines experienced in 2008. Growth in the US, Japan and Western Europe will lag the global average through 2013.

## Motor vehicles to remain largest market

Motor vehicles will remain the largest market for TPEs at the global level, with demand of 1.2 million metric tons in 2013. Through 2013, olefenic (TPOs and TPVs) will continue to see increas-

ing penetration in motor vehicles in both interior and exterior applications. Specific areas of growth include soft-touch TPO trim, TPO airbag covers, TPV body seals, two-shot TPO or TPV overmolding of larger parts such as door panels, TPV weather seals and pre-colored TPO exterior panels that eliminate the need for paint. There is significant interest and collaboration among global automakers and TPE compounders in trying to produce an all-olefenic auto interior and large exterior car panels made with TPOs. In late 2007, the Smart fortwo car became the first commercial vehicle with full body panels manufactured from polypropylene, made with a TPO compound by Borealis (UAE).

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## Sample Text, Table & Chart

### SUPPLY & DEMAND BY REGION & COUNTRY

Unlike in most other countries where motor vehicles represent far the largest market for TPEs, in China the vast footwear industry counts for the largest share of consumption. This is more of an anomaly when compared to other major markets. However, China produces around 50% of the world's footwear that has expanded consistently since 2000. China's rapidly expanding manufacturing sector also has good prospects for future gains in TPE demand. Demand will be driven by a transfer of technology from Western multinational automakers that have already garnered significant experience in interior and exterior areas for TPE use in motor vehicles. China's TPE market will also benefit from rapid expansion in the country's sizable manufacturing and industrial sector, where TPEs are gaining new applications in conveyor belts, mounts and impact-absorbing devices, grommets and bellows.

Chinese production of thermoplastic elastomers, primarily SBCs and TPOs, is projected to outpace growth in demand and expand 9.4 percent per year through 2013 to 1.2 million metric tons. Nevertheless, China's trade deficit in TPEs will expand to 286,000 metric tons in 2013. The Chinese footwear industry predominantly consumes SBCs in the production of soles, uppers and "rubberized" shoe parts. This has significantly bolstered exports to China from Taiwan based SBC manufacturers such as LCY, Chi Mei and TSRC in recent years.

State-controlled China Petroleum & Chemical Corporation (Sinopec) dominates TPE production in China through various subsidiaries. All of the company's production is dedicated to SBCs, with capacity totaling 420,000 metric tons per year in 2008 spread among three plants. A large number of other locally based companies produce much smaller quantities of TPEs in China, usually at plants dedicated to the production

**SAMPLE TEXT**

TABLE IV-7

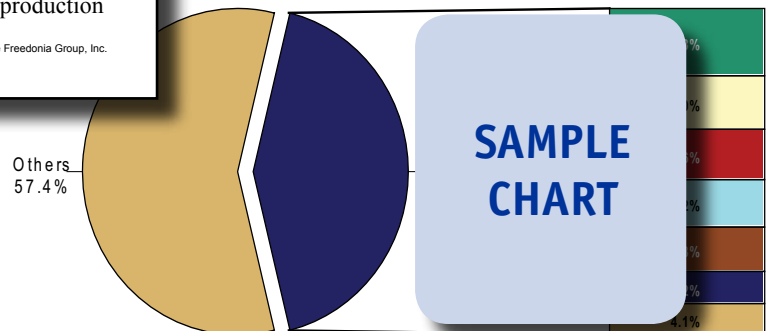
### WORLD THERMOPLASTIC POLYOLEFIN ELASTOMER DEMAND

Item	1998	2003	2008	2013	2018
Population (million persons)					65
GDP per capita					10
Gross Domestic Product (bil 2007\$)					30
\$ per mil \$ GDP					4
kg per capita					5
kg per mil \$ GDP					2
TPO Demand (mil \$)					50
\$/kg					39
TPO Demand (000 metric tons)					10

**SAMPLE TABLE**

CHART VI-1

### WORLD MARKET SHARE FOR THERMOPLASTIC ELASTOMERS BY COMPANY, 2008 (\$12.5 billion)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Dow Corning Corporation

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 Midland, MI 48686  
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Sales: \$  
 Employe

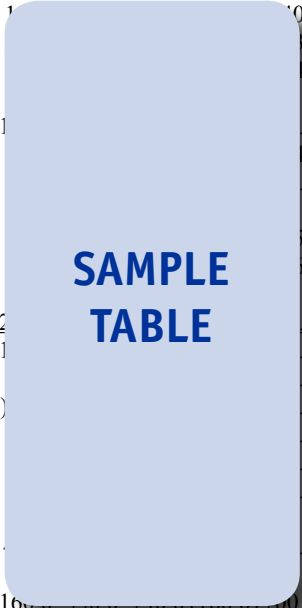
Key Pro  
 olefins, s

Dow Corning Corporation is a Corning Company (Midland, Michigan). The Company develops, manufactures and markets polymers and other materials based on silicon chemistry. Dow Corning's products are designed to release, defoam, insulate, waterproof, lubricate, seal, coat and protect.

The Company is active in the world thermoplastic elastomer (TPE) industry through the Multibase SA subsidiary (France). Multibase manufactures and markets TPEs, filled polyolefins, engineering thermoplastics and alloys, and specialty colored compounds. Multibase's TPE products are manufactured and sold under the TPSIV and MULTI-FLEX brand names. TPSIV products are thermoplastic silicone vulcanizates comprising fully cured silicone particles dispersed in a continuous phase of engineering thermoplastic. Multibase's TPSIV products include the 3000 series, which is engineered to provide oil and chemical resistance, high-temperature performance, softness, and high elasticity; and the 1180-50D series, which offers improved chemical and temperature resistance.

**TABLE V-14**  
**CHINA -- THERMOPLASTIC ELASTOMER SUPPLY & DEMAND**  
**(000 metric tons)**

Item	1998	2003	2008	2013	2018
Population (million persons)	1,210	1,300	1,390	1,480	1,570
\$ GDP/capita	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2007\$)	10,000	15,000	20,000	25,000	30,000
\$ per mil \$ GDP	100	150	200	250	300
kg per capita	13	15	17	19	21
kg per mil \$ GDP	13	15	17	19	21
TPE Demand (mil \$)	10	15	20	25	30
\$/kg	14	13	12	11	10
Thermoplastic Elastomer Demand	2,000	2,500	3,000	3,500	4,000
Styrenic Block Copolymers (SBCs)	1,000	1,200	1,400	1,600	1,800
Thermoplastic Polyolefins (TPOs)	1,000	1,300	1,600	1,900	2,200
Thermoplastic Polyurethanes (TPUs)	0	0	0	0	0
Thermoplastic Vulcanizates (TPVs)	0	0	0	0	0
Copolyester Elastomers (COPEs)	0	0	0	0	0
Other TPEs	0	0	0	0	0
net exports	0	0	0	0	0
Thermoplastic Elastomer Production	16,000	17,000	18,000	19,000	20,000



"... China will increase its share of the world TPE market from just under 32 percent in 2008 to over 34 percent in 2013. On a value basis, the Chinese TPE market will expand 10.9 percent per year through 2013 to \$4.7 billion due to stronger growth in higher-end products such as TPVs, COPEs and COPAs. Currently, on a volume basis, almost two-thirds of the Chinese TPE market is accounted for by low-cost SBCs."

--Section V, pg. 168

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**Extruded Plastics**

This study analyzes the US extruded plastic industry. It presents historical demand data for the years 1998, 2003 and 2008, and forecasts for 2013 and 2018 by extruded plastic resin (e.g., polyvinyl chloride, low density polyethylene, high density polyethylene, polystyrene, polypropylene, polyester) and market (e.g., construction, packaging, consumer goods). The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#2566 ..... 11/2009..... \$4700

**World Bioplastics**

This study analyzes the global bioplastic industry. It presents historical demand data for 1998, 2003 and 2008 and forecasts for 2013 and 2018 by resin (e.g., starch-based, polylactic acid, PHAs, petroleum-based, bio-based polyethylene, bio-based polyesters, bio-based polyamides), market (e.g., packaging, nonpackaging), world region (e.g., Western Europe, Asia/Pacific, North America) and for 12 national markets. The study also considers market environment factors, evaluates market share and profiles industry players.

#2548 ..... 10/2009..... \$5800

**Foamed Plastics**

US foamed plastics demand will reach 8.4 billion pounds in 2013 as key construction and motor vehicle markets recover. Foamed urethane will remain the largest segment while foamed LDPE grow the fastest. Construction will provide the best opportunities based on growth in insulation and carpet underlay applications. This study analyzes the \$22.5 billion US foamed plastics industry, with forecasts for 2013 and 2018 by market and product. It also evaluates market share and profiles industry players.

#2532 ..... 07/2009..... \$4700

**Fluoropolymers**

US demand for fluoropolymers will rise 4.5% annually through 2013. Gains will be driven in part by a turnaround in key markets such as motor vehicles and wire and cable, and rising demand in fast-growing emerging markets such as advanced batteries, fuel cells and photovoltaic modules. PTFE will remain the largest type while fluoroelastomers will grow the fastest. This study analyzes the \$1.4 billion US fluoropolymer industry, with forecasts for 2013 and 2018. It also evaluates company market share and profiles industry players.

#2496 ..... 05/2009..... \$4600

**Reinforced Plastics**

US demand for reinforced plastics will reach 3.6 billion pounds in 2013. Glass fibers will remain the dominant reinforcement material while carbon fiber and nanomaterial reinforcements grow faster. Reinforced thermosets will remain the largest resin type, with growth slightly outpaced by thermoplastics. This study analyzes the 3.2 billion pound US reinforced plastics industry, with forecasts for 2013 and 2018 by reinforcement, resin and market. It also evaluates market share and profiles industry players.

#2489 ..... 05/2009..... \$4600

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