

**Polyurethane Chemicals and
Products in Europe, Middle
East and Africa (EMEA)
VOLUME 3 – NON-FOAM PRODUCTS
Section 4: Binders**

**© IAL CONSULTANTS
NOVEMBER 2005**

CP House, 97-107 Uxbridge Road, Ealing, London W5 5TL
Tel: +44 (0) 20 8832 7780 Fax: +44 (0) 20 8566 4931
Email: ial@brg.co.uk
Web site: www.ialconsultants.com

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form, or by any means, electronic, mechanical, photocopying, recording or otherwise without the prior permission of the copyright owner.

NOTE

The information given in this report has been compiled from published sources and interpreted from fieldwork based on informed opinions. Whilst every care has been taken in the preparation of the report, there may have been some errors in the information obtained. Although it is impossible to verify every single detail by cross checking, we believe the general picture provided is reasonably accurate and comprehensive.

Many IAL reports contain an overview of selected company financial information and capabilities based on published sources where available. Although the companies represented are believed to be the major suppliers the profiles are meant to be indicative rather than definitive.

It is fundamental to the philosophy of IAL Consultants to constantly seek to extend and improve our service to clients. In pursuit of these aims, we shall be pleased to consider all requests for regular or periodic updating of all or any part of the information contained in this report, or for extensions in coverage in terms of product areas, market sectors and/or geographic regions.

We are, of course, always happy to discuss with any subscriber the possibility of undertaking further work, whether arising out of this report or in different business areas.

MORE INFORMATION ON IAL CONSULTANTS

At the end of this report you will find a copy of a list of our latest published reports. Should you require more information on either our published reports or our private client services, please contact us at the address given.

Full details on all IAL Consultants published studies (including full tables of contents and tables of tables) and ad-hoc research services can be found on our website :

www.ialconsultants.com

CONTENTS

1. INTRODUCTION.....	1
1.1 SCOPE OF THE STUDY	2
1.2 METHODOLOGY.....	2
1.3 PRODUCTS AND END-USES	3
1.4 UNITS OF VOLUME.....	3
1.5 FORECASTS	3
1.6 FORMULATIONS	4
1.7 ABBREVIATIONS.....	4
2. MARKET SUMMARY AND FORECAST TO 2009.....	5
2.1 TOTAL EMEA PRODUCTION OF PU BINDERS.....	5
2.2 TOTAL EMEA PRODUCTION OF PU BINDERS AND RELATED RAW MATERIAL CONSUMPTION, 2004.....	7
2.2.1 <i>Total EMEA by End-use</i>	7
2.3 TOTAL EMEA PRODUCTION OF PU BINDERS BY TYPE & COUNTRY	8
2.3.1 <i>Western Europe</i>	8
2.4 FORECAST EMEA PRODUCTION OF PU BINDERS AND RELATED RAW MATERIAL CONSUMPTION 2009.....	9
2.4.1 <i>Total EMEA by End-use</i>	9
2.5 FORECAST TOTAL EMEA PRODUCTION OF PU BINDERS BY TYPE & COUNTRY	10
2.5.1 <i>Western Europe</i>	10
3. TECHNICAL & COMMERCIAL BACKGROUND	13
3.1 BINDERS.....	13
3.1.1 <i>Introduction</i>	13
3.1.2 <i>Forest Products</i>	13
3.1.3 <i>Foundry Core</i>	16
3.1.4 <i>Rubber Crumb</i>	16
3.1.5 <i>Others</i>	17
Eco Products.....	17
Rock Stabilisation.....	17
4. WESTERN EUROPE – MARKET REVIEW.....	21
4.1 AUSTRIA	21
4.1.1 <i>PU Binder Production and Related Raw Material Consumption 2004</i>	21
4.1.2 <i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	22
4.1.3 <i>Growth in PU Binder Production 2004-2009</i>	23
4.2 BENELUX.....	24
4.2.1 <i>PU Binder Production and Related Raw Material Consumption 2004</i>	24
4.2.2 <i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	25
4.2.3 <i>Growth in PU Binder Production 2004-2009</i>	26
4.3 FRANCE.....	27
4.3.1 <i>PU Binder Production and Related Raw Material Consumption 2004</i>	27
4.3.2 <i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	28
4.3.3 <i>Growth in PU Binder Production 2004-2009</i>	29
4.4 GERMANY	30
4.4.1 <i>PU Binder Production and Related Raw Material Consumption 2004</i>	30
4.4.2 <i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	31
4.4.3 <i>Growth in PU Binder Production 2004-2009</i>	32
4.5 ITALY.....	33
4.5.1 <i>PU Binder Production and Related Raw Material Consumption 2004</i>	33
4.5.2 <i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	34
4.5.3 <i>Growth in PU Binder Production 2004-2009</i>	35

4.6	NORDIC REGION	36
4.6.1	<i>PU Binder Production and Related Raw Material Consumption 2004</i>	36
4.6.2	<i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	37
4.6.3	<i>Growth in PU Binder Production 2004-2009</i>	38
4.7	PORTUGAL	39
4.7.1	<i>PU Binder Production and Related Raw Material Consumption 2004</i>	39
4.7.2	<i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	40
4.7.3	<i>Growth in PU Binder Production 2004-2009</i>	41
4.8	SPAIN	42
4.8.1	<i>PU Binder Production and Related Raw Material Consumption 2004</i>	42
4.8.2	<i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	43
4.8.3	<i>Growth in PU Binder Production 2004-2009</i>	44
4.9	SWITZERLAND	45
4.9.1	<i>PU Binder Production and Related Raw Material Consumption 2004</i>	45
4.9.2	<i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	46
4.9.3	<i>Growth in PU Binder Production 2004-2009</i>	47
4.10	UNITED KINGDOM.....	48
4.10.1	<i>PU Binder Production and Related Raw Material Consumption 2004</i>	48
4.10.2	<i>Forecast PU Binder Production and Related Raw Material Consumption, 2009</i>	49
4.10.3	<i>Growth in PU Binder Production 2004-2009</i>	50
5.	EASTERN EUROPE, MIDDLE EAST & AFRICA - MARKET REVIEW	51
5.1	EASTERN EUROPE	51
5.2	MIDDLE EAST & AFRICA.....	51
6.	MARKET TRENDS & INFLUENCES.....	53
6.1	FOREST PRODUCTS	53
6.1.1	<i>Production of Wood-based Products</i>	53
6.1.2	<i>Usage of MDI-based Binders</i>	54
6.2	ECO PRODUCTS	55
6.3	ROCK STABILISATION.....	55
6.4	RUBBER CRUMB	57
7.	MAJOR PRODUCERS OF PU BINDERS.....	59
7.1	DIRECTORY OF PU BINDER SUPPLIERS	60
7.1.1	<i>Belgium</i>	60
7.1.2	<i>Denmark</i>	60
7.1.3	<i>France</i>	60
7.1.4	<i>Germany</i>	60
7.1.5	<i>Italy</i>	61
7.1.6	<i>Netherlands</i>	62
7.1.7	<i>Portugal</i>	62
7.1.8	<i>Spain</i>	62
7.1.9	<i>Sweden</i>	63
7.1.10	<i>United Kingdom</i>	63
8.	SOURCES OF INFORMATION.....	65

TABLE OF TABLES

1. INTRODUCTION.....	1
1.1 SCOPE OF THE STUDY	2
1.2 METHODOLOGY.....	2
1.3 PRODUCTS AND END-USES	3
1.4 UNITS OF VOLUME.....	3
1.5 FORECASTS	3
1.6 FORMULATIONS	4
PU Binders: Raw Material Formulations Used (% w/w).....	4
1.7 ABBREVIATIONS.....	4
List of Abbreviations Used.....	4
2. MARKET SUMMARY AND FORECAST TO 2009.....	5
2.1 TOTAL EMEA PRODUCTION OF PU BINDERS.....	5
Total Production of PU Binders in EMEA by Type and Region 2004 (Tonnes).....	5
Forecast Total Production of PU Binders in EMEA by Type and Region, 2009 (Tonnes).....	5
Forecast EMEA Growth in PU Binders Production by Type and Region, 2004-2009 (% Growth p.a.).....	6
2.2 TOTAL EMEA PRODUCTION OF PU BINDERS AND RELATED RAW MATERIAL CONSUMPTION, 2004.....	7
Total EMEA PU Binders Production and Related Raw Material Consumption, 2004 (Tonnes).....	7
2.3 TOTAL EMEA PRODUCTION OF PU BINDERS BY TYPE & COUNTRY	8
Western European PU Binders Production by Type and Country, 2004 (Tonnes).....	8
2.4 FORECAST EMEA PRODUCTION OF PU BINDERS AND RELATED RAW MATERIAL CONSUMPTION 2009.....	9
Forecast EMEA PU Binders Production and Related Raw Material Consumption, 2009 (Tonnes).....	9
2.5 FORECAST TOTAL EMEA PRODUCTION OF PU BINDERS BY TYPE & COUNTRY	10
Forecast Western European PU Binders Production by Type and Country, 2009 (Tonnes).....	10
Forecast Growth in Western European PU Binders Production, 2004-2009 (%)	11
3. TECHNICAL & COMMERCIAL BACKGROUND	13
3.1 BINDERS.....	13
Production of Wood-based Composites in Europe, 2004 (Million m ³)	14
Number of MDF & Particleboard Producers in Europe.....	14
4. WESTERN EUROPE – MARKET REVIEW.....	21
4.1 AUSTRIA	21
PU Binders Production and Related Raw Material Consumption in Austria, 2004 (Tonnes).....	21
Forecast PU Binders Production and Related Raw Material Consumption in Austria, 2009 (Tonnes)	22
Forecast Growth in PU Binders Production in Austria, 2004-2009 (%).....	23
4.2 BENELUX.....	24
PU Binders Production and Related Raw Material Consumption in Benelux, 2004 (Tonnes).....	24
Forecast PU Binders Production and Related Raw Material Consumption in Benelux, 2009 (Tonnes).....	25
Forecast Growth in PU Binders Production in Benelux, 2004-2009 (%)	26
4.3 FRANCE.....	27
PU Binders Production and Related Raw Material Consumption in France, 2004 (Tonnes).....	27
Forecast PU Binders Production and Related Raw Material Consumption in France, 2009 (Tonnes)	28
Forecast Growth in PU Binders Production in France, 2004-2009 (%).....	29
4.4 GERMANY	30
PU Binders Production and Related Raw Material Consumption in Germany, 2004 (Tonnes).....	30
Forecast PU Binders Production and Related Raw Material Consumption in Germany, 2009 (Tonnes)	31
Forecast Growth in PU Binders Production in Germany, 2004-2009 (%).....	32
4.5 ITALY.....	33
PU Binders Production and Related Raw Material Consumption in Italy, 2004 (Tonnes)	33
Forecast PU Binders Production and Related Raw Material Consumption in Italy, 2009 (Tonnes).....	34
Forecast Growth in PU Binders Production in Italy, 2004-2009 (%)	35
4.6 NORDIC REGION	36
PU Binders Production and Related Raw Material Consumption in the Nordic Region, 2004 (Tonnes).....	36

	Forecast PU Binders Production and Related Raw Material Consumption in the Nordic Region, 2009 (Tonnes).....	37
	Forecast Growth in PU Binders Production in the Nordic Region, 2004-2009 (%).....	38
4.7	PORTUGAL	39
	PU Binders Production and Related Raw Material Consumption in Portugal, 2004 (Tonnes).....	39
	Forecast PU Binders Production and Related Raw Material Consumption in Portugal, 2009 (Tonnes).....	40
	Forecast Growth in PU Binders Production in Portugal, 2004-2009 (%)	41
4.8	SPAIN	42
	PU Binders Production and Related Raw Material Consumption in Spain, 2004 (Tonnes)	42
	Forecast PU Binders Production and Related Raw Material Consumption in Spain, 2009 (Tonnes)	43
	Forecast Growth in PU Binders Production in Spain, 2004-2009 (%).....	44
4.9	SWITZERLAND	45
	PU Binders Production and Related Raw Material Consumption in Switzerland, 2004 (Tonnes).....	45
	Forecast PU Binders Production and Related Raw Material Consumption in Switzerland, 2009 (Tonnes)	46
	Forecast Growth in PU Binders Production in Switzerland, 2004-2009 (%).....	47
4.10	UNITED KINGDOM	48
	PU Binders Production and Related Raw Material Consumption in the United Kingdom, 2004 (Tonnes).....	48
	Forecast PU Binders Production and Related Raw Material Consumption in the United Kingdom, 2009 (Tonnes)....	49
	Forecast Growth in PU Binders Production in the United Kingdom, 2004-2009 (%)	50
5.	EASTERN EUROPE, MIDDLE EAST & AFRICA - MARKET REVIEW	51
5.1	EASTERN EUROPE	51
5.2	MIDDLE EAST & AFRICA.....	51
6.	MARKET TRENDS & INFLUENCES	53
6.1	FOREST PRODUCTS	53
6.2	ECO PRODUCTS	55
6.3	ROCK STABILISATION.....	55
6.4	RUBBER CRUMB	57
7.	MAJOR PRODUCERS OF PU BINDERS	59
7.1	DIRECTORY OF PU BINDER SUPPLIERS	60
8.	SOURCES OF INFORMATION	65
