

PLASTICIZERS

**North America, Europe, and Asia
Markets, Technologies and Trends 1999-2004**

**Prospectus For
An In-Depth Market/End-Use Economics Study
Completed April 2000**

Global Demand and Supply
Profiles of Major Global Suppliers of Plasticizers
Significant Raw Materials & Technologies
Major PVC End Uses by Application
Detailed Profiles of Non-PVC Uses
Major End Users by Application
In-depth Profiles for Other Regions of the World
Detailed Trends and Drivers
Impact of Regulations
Health & Environmental Issues



Chemical Market Resources, Inc.

560 Blossom, Suite C, Webster, TX 77598
Tel: (281) 557-3320 Fax: (281) 557-3310 www.CMRHouTex.com

PLASTICIZERS

North America, Europe and Asia Markets, Technologies and Trends 1999-2004

INDUSTRY OVERVIEW

There are seven major types of plasticizers including: (1) Phthalates, (2) Aliphatics, (3) Epoxidized Vegetable Oils (EPOs), (4) Phosphates, (5) Trimellitates, (6) Citrates, (7) Polymeric and others.

PVC accounts for the majority of the demand for these plasticizers. The major applications of PVC where plasticizers can be used are: (1) wire and cable, (2) floor coverings, (3) wall coverings, (4) construction, (5) automotive applications, (6) packaging, (7) medical applications, (8) sporting goods, (9) footwear, (10) adhesive tapes and others. In addition to PVC, several other materials also use plasticizers. These materials include polyvinyl acetate (PVAc), cellulose acetate, polyvinyl butyral, nitrile rubber, polysulfide and polyurethane sealants, acrylics, polyvinylidene chloride (PVdC) and several other thermoplastics and thermosets.

The global demand for plasticizers was 4,601 thousand metric tons (10,145 million pounds) in 1999. The overall global growth rate for plasticizers is expected to be about 2.8% per annum for the next five years. The three major regions, North America, Europe and Japan, accounted for 60% (6,110 million pounds) of the demand. The remainder was accounted for by the rest of the world including: (1) other Asian countries, (2) Latin America and (3) other regions (including South Africa and the Middle East).

BENCHMARK STUDY

To assist companies in understanding the current market status and help them monitor the recent developments within the industry, Chemical Market Resources, Inc. (CMR), presents **PLASTICIZERS 1999-2004 North America, Europe and Asia**, part of the ongoing **Chemicals Markets, Technologies and Trends Series**. CMR has extensive experience in plasticizer and PVC related markets. This study represents a comprehensive report with focus on business and technical strategic analysis and includes an in-depth analysis of the status of these products and markets. The report will be valuable in assessing opportunities and strategies in the plasticizer industry.

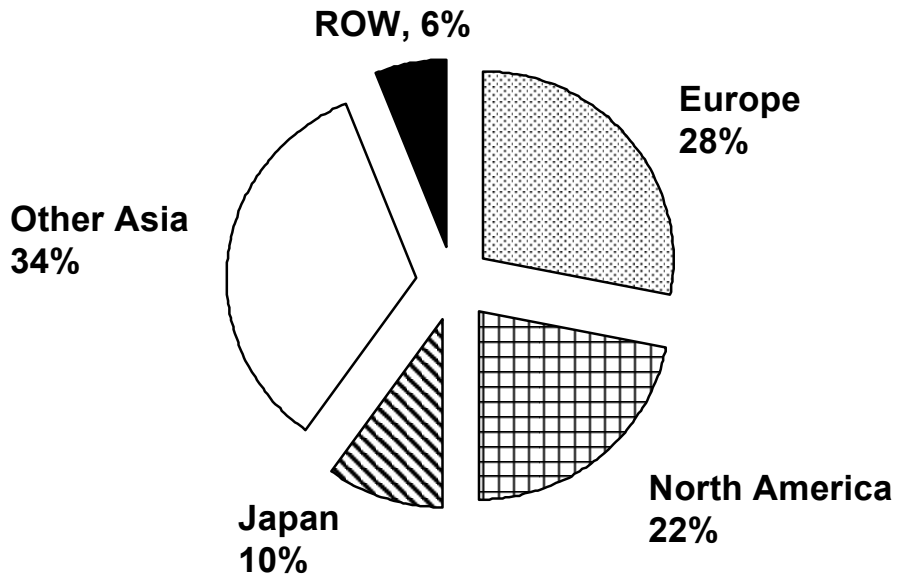
MAJOR OBJECTIVES

- *Assist plasticizer suppliers in assessing the attractiveness of various end use markets*
- *Assist suppliers and end users in evaluating and quantifying the impact of regulations and health-related issues on the plasticizer industry*
- *Assist end users in selecting the appropriate types of plasticizers and assessing manufacturing costs and intermaterial competition*

Plasticizer Types by Supplier, Europe, 1999

PLASTICIZER		SUPPLIERS								
		PHthalATES	ALIPHATICS	EPOXIES	TRIMELLITATES	PHOSPHATES	POLYMERICS	CITRATES	OTHERS	
1	Akros Chemicals			●			●			
2	BASF Aktiengesellschaft	●	●				●			
3	BASF Espanola de Petroleos									
4	Bayer, AG	●	●			●	●			
5	Boryszew	●	●							
6	BP Amoco	●	●							
7	Celanese	●	●			●				
8	Chemie Linz, GmbH	●	●						●	
9	Cray Valley (Total Fina)	●	●							
10	DEZA, a.s.	●	●							
11	DSM Resins Benelux BV	●	●		●		●			
12	Elf Atochem, S.A.	●	●	●						
13	Enichem, Srl	●	●							
14	Exxon Mobil	●	●							
15	FMC Corporation (UK) Ltd.	●	●		●	●	●			
16	GDP-Gas de Portugal, S.A.	●	●							
17	Henkel KGaA	●	●	●			●			
18	ICI France, S.A.	●	●		●					
19	Industrie Generali, SpA	●	●							
20	Laporte Performance Chemicals	●	●		●					
21	Lonza, SpA	●	●		●		●			
22	Neste Oxo, AB	●	●							
23	Neste Oy Chemicals	●	●							
24	Oxeno (Huls)	●	●		●		●			
25	Pantochim, S.A (SISAS)	●	●							
26	Reilly Chemicals, S.A.	●	●					●		
28	RWE-DEA, AG	●	●		●					
29	SISAS	●	●							
30	Solutia	●	●			●				
31	Solventul	●	●							
32	Unichema Chemie BV	●	●				●			
33	Zak, S.A.	●	●							

Worldwide Demand for Plasticizers, 1999



Global Demand for Plasticizers = 10 Billion Pounds

KEY ISSUES ADDRESSED

Worldwide supply & demand for plasticizers
In-depth analysis of the global plasticizer markets
Impact of regulations on various plasticizer end-use markets
Detailed trends for all significant plasticizer applications
Profitability and manufacturing costs
Opportunities for non-phthalate plasticizers
Vulnerability of raw material producers
Market positioning of plasticizer suppliers
Strategic analysis and future trends for all regions of the world

APPROACH

The information, data and conclusions of this analysis were developed from sources in North America, Europe and Rest of the World, and are based upon, but not limited to, the following methods:

Interviews with industry experts, leading suppliers of plasticizers, and major end-users in each market segment
A search, a review and an interpretation of information from government sources, trade and industry groups, published articles and product promotional information
A thorough search of relevant technology and process details from producers
A review and update of information from non-proprietary CMR projects related to plasticizers
A review and update of other multiclient studies completed by CMR
A review and update of the manufacturing cost economics based on our extensive cost databases and interviews
An analysis of the intermaterial competition based on "indifference analysis," a technique used by CMR and well accepted by our major clients.

TIMING, SUBSCRIPTION & ORDERING INFORMATION

This study was completed in April 2000 and is available for immediate delivery. The price of the study is U.S. \$9,500 for two copies of the report. Additional copies are available for \$250 each. To subscribe, simply sign the attached order form and mail or fax to CMR. This study is part of the Chemicals MT&T series. For further information call us at 281-333-3313.

ABOUT OUR COMPANY...

CHEMICAL MARKET RESOURCES, INC. was founded in 1990 to focus in the areas of marketing research and strategic planning. Our global clientele is concentrated within the chemical, petrochemical, plastics and related industries. Prior to joining CMR our associates held supervisory positions in chemical and allied industries. Our teams of professionals have strong technical backgrounds combined with hands-on business experience. Compilations of data, strategic analyses, writing and editing are entirely conducted in our state of the art facilities in-house to assure quality control at each stage of development. Our strength is in closely interacting with our clients to maximize effectiveness. We provide in-depth analyses with actionable statements in a cost-effective and timely fashion. Following are highlights of just some of our work in chemicals and plastics.

Multiclient Studies

Plasticizers - North America, Europe and Asia 1999-2004 - Markets Technologies & Trends - Completed April 2000

North American Chemical Consumption Databases. Completed databases are: Caustic Soda and Potash Series, isocyanates Series, Glycol Series and Phenol/Acetone Series

Polyolefins MT&T Series - North America, Europe and Japan - Markets Technologies & Trends. Completed studies are: Polypropylene Films (December 1996), High EVA Copolymers (June 1997), Polyolefin Foams (December 1997), Tie Layer Resins (June 1998), Polypropylene Fibers (April 1999) and Thermoplastic Polyolefin Elastomers (December 1999)

New generation Polyolefins vs. SB Copolymers - North America, Europe and Japan 1995 - 2000 - Markets, Technologies & Trends - Completed January 1995

North American Unsaturated Polyesters 1994-2000 - Markets, Technologies and Intermaterial Competition - Completed January 1994

North American Antifreeze Recycling Markets 1994-2000 - Markets, Technologies and Trends - Completed January 1994

Periodicals

New Generation Polyolefins - Bimonthly Global Review of Technologies & Trends. On-going service, published six times a year. Qualifying companies can call for a complimentary copy!

Proprietary Studies

We have positioned numerous polyolefin and chemical products in the markets in North and Latin America, Europe, and Asia Pacific. We have conducted studies for most of the major chemical suppliers and end users - Call us for a list of proprietary studies.

Conferences

We conduct a highly successful Annual Conference FlexPO that covers intermaterial competition among flexible polymers including fPVC, polyolefins, TPEs and rubbers. FlexPO 2000 will be held August 23rd through the 25th in the San Luis Hotel, Resort and Conference Center in Galveston (Houston), Texas.

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