

POLYPROPYLENE FIBERS MARKETS, TECHNOLOGIES & TRENDS 1998-2003

PR 229

Prospectus For An In-Depth Market/End Use Economics Study

North American Market Size & growth Rtes
Polypropylene Fiber Producers/Profiles
Polypropylene Fiber Technologies
Type of Polypropylene Fibers – End Uses & Growth Rates
Impact of New Generation Polyolefins
Attribute Analysis – Major End Use Requirements
Market/Technology Position of Major Fiber Producers
European and Japanese Market Size & growth Rates
Manufacturing Cost Analysis – Modular Approach
Growth Drivers

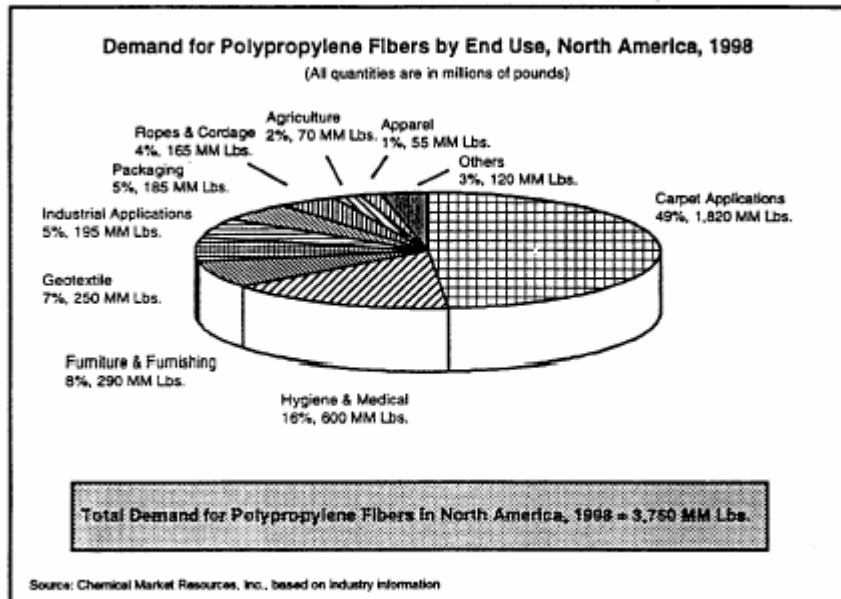


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POLYPROPYLENE FIBERS SHOWING STRONG GROWTH



METALLOCENES..... MAKING INROADS!!

POLYPROPYLENE FIBERS 1998-2003

CHEMICAL MARKET RESOURCES, INC. POLYOLEFINS - MARKETS, TECHNOLOGIES & TRENDS SERIES

INTRODUCTION

The total demand for polypropylene fibers in North America was 3,750 million pounds in 1998. The demand for polypropylene fibers is projected to grow at the rate of 5.2% annually for the next five years. The total demand for polypropylene fibers in Western Europe was about 3,520 million pounds in 1998, and it is projected to grow at 3% annually for the next five years. The total demand for polypropylene fibers in Japan was 338 million pounds in 1998, and it is projected to grow at 4.5% per year for the next five years.

Polypropylene is the last of the synthetics to enter the fiber market segment. This late entry proved to be of advantage as the markets and fiber manufacturing technologies were already in place. Polypropylene can be used in any of the extrusion lines with only minor modifications. The excellent properties and the processability of polypropylene resins triggered the replacement of some synthetic as well as natural fibers. Presently these fibers are used in carpet, hygiene and medical, home furnishing, geotextile, packaging, filtration, agriculture and apparel applications. Metallocene catalyzed polypropylene is currently being used in nonwoven markets such as hygiene and medical, filtration and geotextiles. In the woven applications, metallocene catalyzed polypropylene resins are being evaluated by major fiber suppliers.

BENCHMARK MARKET STUDY

To assist companies in developing an in-depth analysis of the current market status and monitoring rapid developments, Chemical Market Resources, Inc. (CMR), with our extensive experience in polypropylene fiber markets, presents a comprehensive business/technical strategic analysis that reports in-depth on the intermaterial competition of these products/markets. The report will assess the opportunities and the strategies for developing these markets.

THE MAJOR OBJECTIVES

Assist polyolefin producers in effectively positioning their resins for the polypropylene fiber market

Evaluate and quantify the impact of metallocenes and other "New Generation" polyolefins on global polypropylene fiber markets

Assist polypropylene fiber producers in assessing market trends and intermaterial competition

Assist major end users in selecting the appropriate type of the polypropylene resin and understanding manufacturing cost economics

KEY ISSUES ADDRESSED

Outline of the global polypropylene fiber markets

In-depth opportunity analysis for mergers and acquisitions in the North American marketplace

Current & future technologies for polypropylene fiber manufacturing cost

Market/technology positioning of major polypropylene fiber producers

End use requirements for polyolefin resins and unmet needs of major polypropylene fiber producers

Impact of new generation polyolefins on polypropylene fiber markets

Detailed manufacturing cost analysis for polypropylene fibers

APPROACH

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

Search, review and interpretation of information from government sources, trade and industry groups, published articles and product promotional information

A thorough search of relevant patent technology and process details from producers

Information from industry experts and CMR proprietary projects related to polypropylene fibers

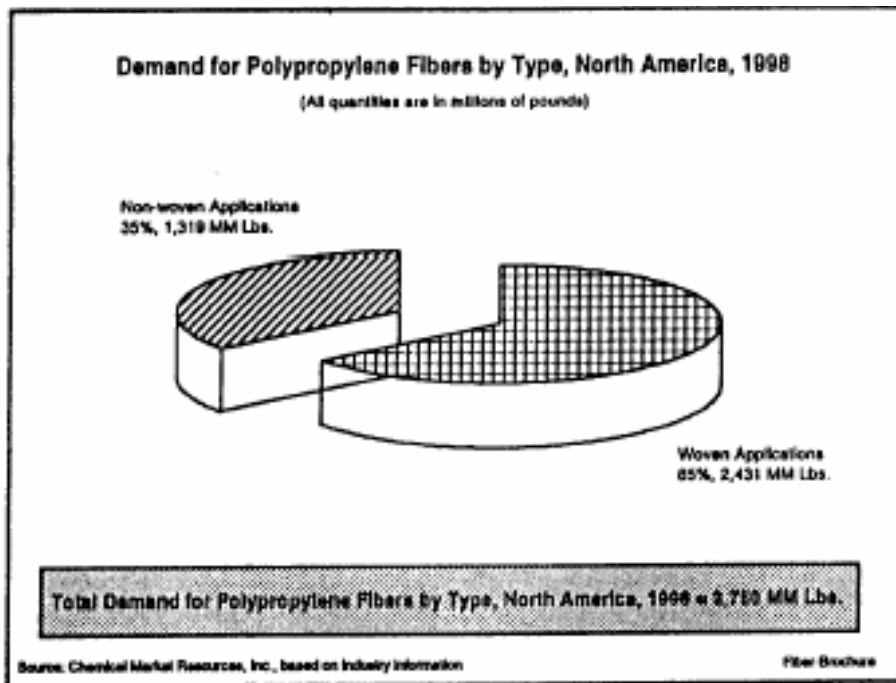
Interviews with leading suppliers of polyolefin and polypropylene fibers, major end users in each market segment

Other multiclient studies completed by Chemical Market Resources, Inc.

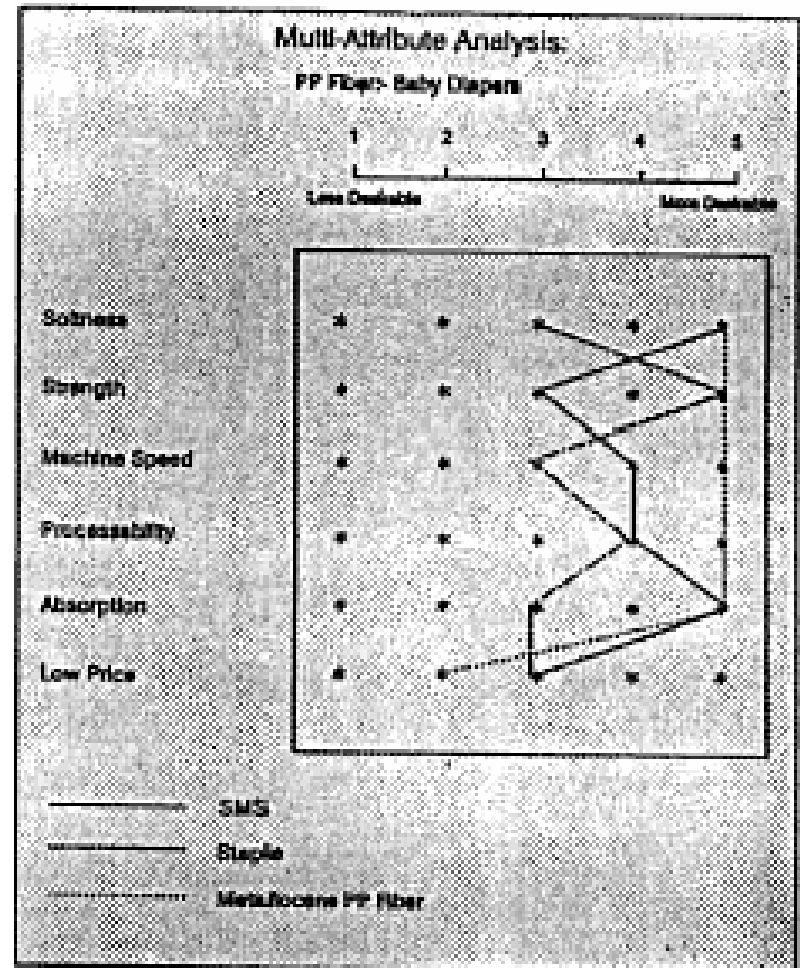
The manufacturing cost economics based on our extensive cost databases and interviews.

The intermaterial competition was analyzed based on "indifference analysis", a technique used by Chemical Market Resources, Inc. and well accepted by our major clients.

POLYPROPYLENE FIBERS.. WOVENS VS. NON WOVENS



METALLOCENE PP... THE FUTURE NONWOVEN FABRIC



Bab-Dia

Source: GIR Analysis

KEY ISSUES ADDRESSED

Outline of the global polypropylene fiber markets

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TIMING, SUBSCRIPTION & ORDERING INFORMATION

This study was completed in December, 1998. The price of the study is 6,500 for two copies of the report. Additional copies are available for \$200 each. To subscribe, simply sign the attached order form and mail/fax to us. The study can be ordered as a part of the Chemical Market Resources, Inc., Polyolefins MT&T series. For further information call (281) 557- 3320 and ask for Dr. Balaji Singh.

PROJECT MANAGEMENT TEAM

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Dr. BALAJI B. SINGH, president of Chemical Market Resources, Inc., obtained his Ph.D. in Chemical Engineering from Texas A&M University and an M.B.A in Marketing Research and Strategic Planning from the Ohio State University. He has seven years of experience in the oil/chemical industry in process research, process economics and marketing research. His key area of expertise is in opportunity evaluation and competitive assessment for technology value added specialty products in petrochemicals and functional chemicals. Balaji has successfully completed over 500 proprietary studies, in high technology specialty products in various end use industry sectors for clients worldwide.

Dr. WILLIAM D. VERNON obtained a B.A. in chemistry from Rice University and a Ph.D. in chemistry from Michigan State University. Bill spent 21 years in the chemical industry, initially as a research scientist and finally as a technology executive in the polyolefins industry. His technical expertise is in the areas of polyolefins manufacturing, catalysis, properties, processing, and analysis as well as general chemical manufacturing.

TAKASHI FUKUDA obtained his Bachelor's degree in Chemical Engineering from Keio University and B.A. degree from Sanno Institute of Business Administration. Takashi has over 25 years of marketing and business research experience in the U.S. and Japan. He worked for Yano Research Institute (Tokyo) for six years in the area of market research of domestic products. He has completed several domestic and international market research projects in the area of petrochemicals, plastics and elastomers during his career with IRM, Inc., (U.S. and Japan) for 15 years. Presently Mr. Fukuda is a senior manager with MDI Research Company, Limited (Tokyo), a well marketing research company in Japan.

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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, Inc. our associates held responsible positions in chemical and allied industries. Our team of professionals have strong technical backgrounds combined with hands-on business experience. Compilation 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.

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We conduct a highly successful Annual Conference – FlexPo- which covers Intermaterial competition among flexible polymers including fPVC, polyolefins, TPEs and rubbers. Our recently concluded FlexPo'98 conference held between June 24-26, at the JW Marriott, in Houston, TX, focused on PVC replacement opportunities.

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Market Research***

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POLYPROPYLENE FIBERS 1998-2003

North America, Europe and Japan Markets, Technologies and Trends 1998-2003

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