
New market study of the European TPE markets

From Patrick Ellis comes a new market study on the European TPE markets. It updates and extends the results of the 2009 market study (The European Market for Styrene- and Olefin-Based Thermoplastic Elastomers).

Table of content:

1. Introduction

2. Composition and Technologies

2.1 Composition

2.2 Technologies

3. European Market Environment, Consumption 2007-2012 and Growth Rate

3.1 European Economic Environment

3.2 By Applications

3.3 Consumption and Growth rate of TPE Compounds 2007-2012

3.4 Alternative markets for SBS elastomers (bitumen modification, adhesives and sealants, etc.)

4. Automotive

4.1 Introduction

4.2 Trends

4.3 Applications

4.4 Major European Moulders and End-Users

4.5 Regulations and Environmental Issues

4.6 Potential for Material Replacement

5 Building and Construction

5.1 Introduction

5.2 Domestic Window Seals and Gaskets

5.3 Roofing Membranes

5.4 Geotextiles

5.5 Other Applications

6. Appliances and Housewares

7. Footwear

8. Medical

8.1 TPE Compounds

8.2 Applications

8.3 Compounds

8.4 Moulders and End-Users

8.5 Regulations and Legislation

9. Packaging

9.1 General

9.2 Wine Bottle Closures

9.3 Caps and Closure Liners

9.4 Others

10. Sports and Leisure

11. Wire & Cable

12. Others

12.1 General

12.2 Fluid Handling

12.3 Fibres

13. Compounders and Polymer Suppliers and their Participation in European TPE Markets

13.1 General

13.2 Polymer Raw Material Suppliers

13.3 Independent Compounders

13.4 Captive Compounders

14. Speciality Applications

14.1 TPE Foams

14.2 Soft Touch TPE

15. Higher Performance TPE Compounds

15.1 Cross-Linked SEBS-based TPE-S

15.2 Non-EPDM Rubber-Based TPE-O and TPE-V

15.1 TPU/SEBS-Based TPE

15.2 Nanofilled TPE

15.3 Metallocene Polyolefin-Based TPE

15.4 PVC/Nitrile Rubber

15.5 High Performance TPE (COPA, COPE, Silicone, TPU)

16. Alternative Raw Materials and Technologies

16.1 Rubber Replacement

16.2 Alternative SBS Markets

17. Summary and Conclusions

TABLES

2. Composition and Technologies

Table 2.1 Typical Compositions of TPE Compounds

Table 2.2 Major Suppliers of Styrene-Butadiene-Styrene Block Copolymers (SBS)

Table 2.3 Suppliers of Hydrogenated Styrene Block Copolymers (SEBS)

Table 2.4 Suppliers of Speciality Styrene Block Copolymers

Table 2.5 Selected Ethylene-Propylene Rubbers Used in the Production of Thermoplastic Elastomer Compounds

Table 2.6 Major Olefin-Based Plastomers (non EPDM/EPM rubbers)

Table 2.7 Elastomers Other than EPDM, Used Potentially in Production of Thermoplastic Elastomers

Table 2.8 Compatibilisers Used in the Production of Speciality TPE Compounds

Table 2.9 Low Molecular Weight Components (Other than Oil)

Table 2.10 Synopsis of Characteristics of Raw Materials Used in the Manufacture of TPE's

Table 2.11 Non-TPE SBS Markets

Table 2.12 Rubber Replacement

3. European Market Environment, Consumption 2007-2012 and Growth Rate

Table 3.1 GNP, Industrial Growth Rates and Cost of Living Changes (2011) of Principal 16 European and Major Non-European Countries

Table 3.2 Passenger Vehicle Production in Europe, by Country (2008-2009)

Table 3.3 Forecast for Light Vehicle Production for the World and China and Japan: 2008-2013

Table 3.4 Quarterly European Construction Index, for Selected Countries (2006-2009)

Table 3.5 European Market for Styrene- and Olefin-Based Thermoplastic Elastomers: 2010

Table 3.6 Estimated Growth Rate and Consumption of Styrene- and Olefin-Based TPE's in the European Market, by Application: 2007-2009

Table 3.7 Estimated Growth Rate and Consumption of Styrene- and Olefin-Based TPE's in the European Market, by Application: 2010-2012

Table 3.8 Estimated Market and Growth Rate in the European Market for High Performance TPE's: 2007-2012

Table 3.9 European Market for Thermoplastic Elastomers, by Type: 2007-2012

Table 3.10 Thermoplastic Vulcanisates (TPE-V) Available in Europe

Table 3.11 Estimated Growth Rate and Consumption of Styrene- and Olefin-Based TPE's in the European Market, by Application: 2011-2014

4. Automotive

Table 4.1.1 World Motor Vehicle Production by Manufacturer 2008

Table 4.1.2 European Motor Vehicle Production, by Country: 2007-2009

Table 4.2 Major OEM Parts Suppliers to European Auto Industry: 2008 & 2007

Table 4.3 Selected European Supplier Parks (Plastics Components)

Table 4.4 Paths to Market: European Automotive Industry

Table 4.5.1 European Market for Styrene- and Olefin-Based TPE Compounds in Automotive Applications: 2007-2012

Table 4.5.2 Major European TPE Compounders Supplying the Automotive Industry: Products Offered

Table 4.5.3 Major European TPE Compounders Supplying to the Auto Sector and Estimated Market Shares: 2009

Table 4.6 Major Automotive Interior Applications: Incumbents and TPE Potentials

Table 4.7 Western European Airbag Composition

Table 4.8 Blow Moulded TPE Engine Compartment Applications

Table 4.9 Body Seals, Glazing and Encapsulation Potential, 2007-2012

Table 4.10 Typical Instrument Panel Skin/Foam Structures

Table 4.11 European Market for TPO Skins (2006-2012)

Table 4.12 Current and Potential Automotive Interior Skin Applications

Table 4.13 Potential Automotive Applications for TPO Coated Fabrics

Table 4.14 European Automobile Producers: Plastics Contacts

Table 4.15 Automotive OEM/Tier 1 Suppliers of Interior Systems, Modules & Components

Table 4.16.1 Major Moulders/Tier 2 & 3 Suppliers 1. Great Britain 2. Italy

Table 4.16.2 Major Moulders/Tier 2 & 3 Suppliers 3. France

Table 4.16.3 Major Moulders/Tier 2 & 3 Suppliers 4. Germany

Table 4.17 Major Glass Encapsulators

Table 4.18 Examples of Major Automotive Rubber Moulders and Extruders Using TPE's

Table 4.19 Regulations and Environmental Issues Regarding the Use of Plastics and Rubbers in the European Automotive Industry

Table 4.20 United States and European Community, Standards and Legislation Regarding Motor Vehicle Safety

Table 4.21 Examples of European TPE Automotive Applications and Their Present (2007) and Future Potential

Table 4.22 European Automotive PVC Applications and Their Estimated Replacement Potential

Table 4.23 Potential for Thermoset Rubber Replacement in Western European Automotive Applications

5. Building and Construction

Table 5.1 European Market for Styrene- and Olefin-Based Thermoplastic Elastomers, in Building and Construction Applications, by Product: 2007-2012

Table 5.2 Estimated Sales of TPE to European TPE Domestic Window Seal Market: 2009

Table 5.3 Important Test Standards Governing the Use of Thermoplastics and Elastomeric Window Seals

Table 5.4 European Suppliers of TPE Window Seals and Gaskets

Table 5.5 European Flat Roof Market, by Product Type and Country: 2006-2009(million m²)

Table 5.6 Single-Ply Roofing Sector in Europe: 2007-2009

Table 5.7 Potential European Suppliers of TPE Roofing Systems

Table 5.8 Characteristics of TPE-S Modified Bitumen Compounds

Table 5.9 Typical Properties of SBS Modified Bitumen

6. Appliances and Housewares

Table 6.1 European Market for Styrene- and Olefin-Based TPE Compounds in Appliances and Housewares Applications: 2007-2012 (thousand tonnes)

Table 6.2 Examples of Users of Styrene- and Olefin-Based TPE Compounds in Appliances and Housewares Applications

7. Footwear

Table 7.1 European Market for Styrene- and Olefin-Based Thermoplastic Elastomers, in Footwear Applications: 2007-2012 (thousand tonnes)

Table 7.2 European TPE Compounders Supplying to the Footwear Sector, 2008

8. Medical

Table 8.1 European Market for Styrene- and Olefin-Based TPE Compounds in Medical Applications: 2007 – 2012

Table 8.2 Typical Applications for TPE-S Compounds in the Medical Sector

Table 8.3 Estimated European Growth of Thermoplastics in Medical Disposal Applications (2007-10)

Table 8.4 Estimated European Health Expenditure for Medical Devices: 2004-2008

Table 8.5 Potential Replacement Markets for TPE Compounds in the European Medical Component Sector

Table 8.6 Factors Affecting Substitution by TPE's in the Medical Sector

Table 8.7 Sources of Viable Information Dealing with Changes and Opportunities in the Medical Components Market

Table 8.8 Estimated European Market for Styrene- and Olefin-Based Thermoplastic Elastomers in Medical Applications, by Supplier and by Product: 2008

Table 8.9 European Market for Thermoplastic Elastomers; Paths to Market – Medical Components

Table 8.10 Western European Suppliers of Medical Components

Table 8.11 European TPE Compounders Active in Medical Sector

9. Packaging

Table 9.1 European Market for Styrene- and Olefin-Based TPE Compounds in Packaging Applications: 2005-2012 (thousand tonnes)

Table 9.2 European Wine Production by Country, 2007-2008 (000 Hectolitres)

Table 9.3 European (EU27) Potential for TPE Wine Closures (tonnes) – 2009

Table 9.4 Examples of European Producers of TPE Container Closures and Liners

10. Sports & Leisure

Table 10.1 European Market for Thermoplastic Elastomers in Sports/Leisure/Toys Applications, by Product: 2007-2012

11. Wire & Cable

Table 11.1 European Market for Styrene- and Olefin-Based TPE Compounds in Wire and Cable Applications: 2005-2012 (thousand tonnes)

Table 11.2 Examples of European Producers of TPE Wire & Cable Applications

12. Others

Table 12.1 European Market for Styrene- and Olefin-Based TPE Compounds in Other Applications: 2007-2012 (thousand tonnes)

Table 12.2 European Market for Styrene- and Olefin-Based TPE Compounds in Fluid Handling Applications: 2007-2012

Table 12.3 Examples of Producers of Thermoplastic and Rubber Casters

13. Compounders and Polymer Suppliers and their Participation in European TPE Markets

Table 13.1 European Compounders of Styrene- and Olefin-Based Thermoplastic Elastomer Compounds

Table 13.2 Major European TPE Compounders Supplying the Automotive Industry: Products Offered

Table 13.3 Major European TPE Compounders Supplying the Building and Construction Market: 2008

Table 13.4 LyondellBasell Structure

Table 13.5 Borealis Structure

Table 13.6 Dow Chemical Structure

Table 13.7 ExxonMobil Structure

14. Speciality Applications

Table 14.1 European Suppliers of Polyolefin Bead Foam Products and Sheet

Table 14.2 Property Comparisons between TPE-S(1) and TPE-V Compounds for Appliances and Housewares in Soft Touch Applications

Table 14.3 Global Demand for Soft-Touch TPE's, 2005-2009

Table 14.4 Examples of European Soft Touch TPE Moulders

15. Higher Performance TPE Compounds

Table 15.1 Properties of TPE-S Compounds Based on Kuraray Vulcanisable SBC's (SEEPS)

Table 15.2 Estimated European Demand for Plastomers (Excluding Film & Fibre, Thousand Tonnes)

Contact:

Patrick Ellis, Mercurey, France

pamellis1@aol.com

Adresse:

<http://www.gupta-verlag.com/thermoplastic-elastomers/news/literature/9855/new-market-study-of-the-european-tpe-markets>