Plasticizers Market by Type, Sub-Type & Geography - Trends and Forecasts to 2019

Description: A plasticizer is a chemical substance which when added to a plastic or a material, produces a product which imparts softness, viscosity, flexibility, and makes it easier to handle. Plasticizers are the most common additives employed in the plastic industry. They are also usually cheaper as compared to the other additives employed in polymer processing. Plasticizers are basically divided into phthalates & non-phthalates. Further phthalates are sub-divided into low & high phthalates. Non-phthalates include adipates, terephthalates, benzoates, and bio-based plasticizers. Further on the basis of their types, plasticizers are sub-divided into DOP, DINP/DIDP, DOTP, bio-based, and others that include various phthalates and non-phthalates such as plasticizers DBP, BBP, DEP, DPHP, DIUP, DOA, DINCH and TOTM.

The consumption trend of plasticizers varies from region to region depending upon its various types. For instance, the consumption trend in Asia-Pacific represents a mix of all the plasticizers. The Asia-Pacific is the biggest consumer of low phthalates especially DOP, which is mainly due to lack of legislative initiatives and due to increasing PVC demand in the region. Additionally, the consumption of high phthalates and non-phthalates is also prominent in the region. The region is the biggest and the fastest growing market after RoW for plasticizers, consuming more than 50.0% the total global volume in 2013. The scenario is different in Europe, as non-phthalates and certain high phthalates are dominant in Europe, which is mainly due to the stringent norms and regulations in the region. On the other hand, demand in North America is increasing for DOTP and bio-based non-phthalates as an alternative for low phthalates. Also on the basis of countries, China, Japan, India U.S., and Germany, are the major consumers of plasticizers, with China being at the forefront.

Among the types, although the low phthalates held the largest share of the total volume of plasticizers in 2013, the penetration of plasticizers in the non-phthalates segment is anticipated to grow at a notable pace on account of the looming regulatory changes. Currently, the demand of plasticizers is dominated by the DOP segment that consumed nearly 50.0% of the total plasticizers demanded in 2013, but this demand is projected to decline in the coming few years due to increasing environment and health concerns associated with its exposure. DOTP is expected to be the strongest growth areas of plasticizers in the near future, due to its excellent toxicological profile, and as a direct replacement for DOP & DINP in many applications due to its low volatility.

The key factors driving the industry are identified as growing demand in Asia-Pacific, escalating PVC demand, and development of high & non-phthalates, while emergence of bio-based plasticizers is identified as the major opportunity in the market.

This study on plasticizers market estimates the demand and value for plasticizers and projects the same by 2019. As a part of quantitative analysis, the study segments the market by type & by sub-type at a country and global level, with the current market estimation and forecast till 2019. The countries covered in the report are the U.S., Canada, Mexico, China, Japan, Taiwan, South Korea, India, Thailand, Indonesia, Germany, Russia, Italy, Turkey, France, Poland, Saudi Arabia and Brazil.

Further, as a part of qualitative analysis, the research provides a comprehensive review of major market drivers, restraints, opportunities, winning imperatives, and key issues in the market. It also includes the company profiling and competitive strategies adopted by major market players, including BASF SE (Germany), ExxonMobil Corporation (U.S.), Eastman Chemical Company (U.S.), Evonik Industries AG (Germany), LG Chem Ltd. (South Korea), Aekyung Petrochemical Co. Ltd (South Korea), UPC Technology Corporation (Taiwan), and Nan Ya Plastics Corporation (Taiwan).

Contents:
1 Introduction
  1.1 Objectives Of The Study
  1.2 Market Scope
8 Plasticizers Market, By Sub-Type
8.1 Introduction
8.2 Dioctyl Phthalate (Dop)
8.3 Diisononyl Phthalate (Dinp)/Diisodecyl Phthalate (Didp)
8.4 Dioctyl Terephthalate (Dotp)
8.5 Bio-Based Plasticizer
8.6 Other Plasticizers

9 Plasticizers Market, By Region
9.1 Introduction
9.2 Asia-Pacific
9.2.1 China
9.2.2 Japan
9.2.3 India
9.2.4 South Korea
9.2.5 Taiwan
9.2.6 Thailand
9.2.7 Indonesia
9.3 Europe
9.3.1 Germany
9.3.2 Italy
9.3.3 Turkey
9.3.4 France
9.3.5 Russia
9.3.6 Poland
9.4 North America
9.4.1 U.S.
9.4.2 Canada
9.4.3 Mexico
9.5 Row
9.5.1 Brazil
9.5.2 Saudi Arabia

10 Competitive Landscape
10.1 Introduction
10.2 Competitive Situation And Trends
10.2.1 Overview
10.2.2 Expansions & Marketing Activities: The Most Prevalent Growth Strategy
10.2.3 North America & Europe: Key Regions For Market Players
10.2.4 Eastman Chemical Company: Among The Most Active Players

11 Company Profiles
11.1 Introduction
11.2 Upc Technology Corporation
11.2.1 Business Overview
11.2.2 Products
11.2.3 Key Strategy
11.2.4 Recent Developments
11.2.5 Swot Analysis
11.2.6 Mnm View
11.3 Exxonmobil Corporation
11.3.1 Business Overview
11.3.2 Products
11.3.3 Key Strategy
11.3.4 Recent Developments
11.3.5 Swot Analysis
11.3.6 Mnm View
11.4 Basf Se
11.4.1 Business Overview
11.4.2 Products
11.4.3 Key Strategy
11.4.4 Recent Developments
11.4.5 Swot Analysis
11.4.6 Mnm View
11.5 Nan Ya Plastics Corporation
11.5.1 Business Overview
11.5.2 Products
11.5.3 Key Strategy
11.5.4 Swot Analysis
11.5.5 Mnm View
11.6 Aekyung Petrochemical Co. LTD.
11.6.1 Business Overview
11.6.2 Products
11.6.3 Key Strategy
11.6.4 Recent Developments
11.6.5 Swot Analysis
11.6.6 Mnm View
11.7 Shandong Qilu Plasticizers Co. LTD.
11.7.1 Business Overview
11.7.2 Products
11.7.3 Key Strategy
11.8 Eastman Chemical Company
11.8.1 Business Overview
11.8.2 Products
11.8.3 Key Strategy
11.8.4 Recent Developments
11.9 Lg Chem LTD.
11.9.1 Business Overview
11.9.2 Products
11.9.3 Key Strategy
11.9.4 Recent Developments
11.10 Evonik Industries Ag
11.10.1 Business Overview
11.10.2 Products
11.10.3 Key Strategy
11.10.4 Recent Developments
11.11 Shandong Hongxin Chemicals Co. LTD.
11.11.1 Business Overview
11.11.2 Products
11.11.3 Key Strategy

List of Tables (97 Tables)

Table 1 Impact Of Global Plasticizers Market Drivers (2014-2019)
Table 2 China: Real Gdp
Table 3 China: Expected Plant Capacities
Table 4 Pvc Market Size, By Region, 2012-2019 (KT)
Table 5 Impact Of Global Plasticizers Market Restraints (2014–2019)
Table 6 Impact Of Global Plasticizers Market Opportunities
Table 7 Few Bio-Based Plasticizers Producers For Pvc Globally
Table 8 Global Low Phthalates Market Size (Kilotons) & ($Million), 2012-2019
Table 9 Global High Phthalates Market Size (Kilotons) & ($Million), 2012-2019
Table 10 Global Non Phthalates Market Size (Kilotons) & ($Million), 2012-2019
Table 11 Global Dop Market Size (Kiltons) & ($Million), 2012-2019
Table 12 Global Dinp/Didp Market Size (Kilotons) & ($Million), 2012-2019
Table 13 Global Dotp Market Size (Kilotons) & ($Million), 2012-2019
Table 14 Global Bio-Based Plasticizers Market Size (Kilotons) & ($Million), 2012-2019
Table 15 Global Other Plasticizers Market Size (Kilotons) & ($Million), 2012-2019
Table 16 Plasticizers Market Size, By Region, 2012-2019 (KT)
Table 17 Plasticizers Market Size, By Region, 2012-2019 ($Million)
Table 18 Asia-Pacific: Plasticizers Market Size, By Country, 2012-2019 (KT)
Table 19 Asia-Pacific: Plasticizers Market Size, By Country, 2012-2019 ($Million)
Table 20 China: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 21 China: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 22 China: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 23 China: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 24 Japan: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 25 Japan: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 26 Japan: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 27 Japan: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 28 India: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 29 India: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 30 India: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 31 India: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 32 South Korea: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 33 South Korea: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 34 South Korea: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 35 South Korea: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 36 Taiwan: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 37 Taiwan: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 38 Taiwan: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 39 Taiwan: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 40 Thailand: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 41 Thailand: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 42 Thailand: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 43 Thailand: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 44 Indonesia: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 45 Indonesia: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 46 Indonesia: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 47 Indonesia: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 48 Europe: Plasticizers Market Size, By Country, 2012-2019 (KT)
Table 49 Europe: Plasticizers Market Size, By Country, 2012-2019 ($Million)
Table 50 Germany: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 51 Germany: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 52 Germany: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 53 Germany: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 54 Italy: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 55 Italy: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 56 Italy: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 57 Italy: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 58 Turkey: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 59 Turkey: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 60 Turkey: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 61 Turkey: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 62 France: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 63 France: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 64 France: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 65 France: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 66 Russia: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 67 Russia: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 68 Russia: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 69 Russia: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 70 Poland: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 71 Poland: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 72 Poland: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 73 Poland: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 74 North America: Plasticizers Market Size, By Country, 2012-2019 (KT)
Table 75 North America: Plasticizers Market Size, By Country, 2012-2019 ($Million)
Table 76 U.S.: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 77 U.S.: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 78 U.S.: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 79 U.S.: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 80 Canada: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 81 Canada: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 82 Canada: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 83 Canada: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 84 Mexico: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 85 Mexico: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 86 Mexico: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 87 Mexico: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 88 Row: Plasticizers Market Size, By Country, 2012-2019 (KT)
Table 89 Row: Plasticizers Market Size, By Country, 2012-2019 ($Million)
Table 90 Brazil: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 91 Brazil: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 92 Brazil: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 93 Brazil: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)
Table 94 Saudi Arabia: Plasticizers Market Size, By Type, 2012-2019 (KT)
Table 95 Saudi Arabia: Plasticizers Market Size, By Type, 2012-2019 ($Million)
Table 96 Saudi Arabia: Plasticizers Market Size, By Sub-Type, 2012-2019 (KT)
Table 97 Saudi Arabia: Plasticizers Market Size, By Sub-Type, 2012-2019 ($Million)

List of Figures  (54 Figures)

Figure 1 Plasticizers Market Segmentation, By Type
Figure 2 Plasticizers Market Segmentation, By Sub- Type
Figure 3 Plasticizers Market Hierarchy
Figure 4 Global Plasticizers Market: Research Methodology
Figure 5 Market Size Estimation Methodology: Bottom-Up Approach
Figure 6 Market Size Estimation Methodology: Top-Down Approach
Figure 7 Break Down Of Primary Interviews: By Company Type, Designation, & Region
Figure 8 Plasticizers Market Snapshot, By Sub-Type (2013 Vs 2019): Top Two Segments Cover Three-Forth Of The Market Volume
Figure 9 Global Plasticizers Market Ranking, By Country, 2013
Figure 10 Global Plasticizers Market Share, 2013
Figure 11 Attractive Market Opportunities In Plasticizers Market
Figure 12 Non-Phthalate Plasticizers Are Projected To Be The Fastest Growing Type, 2014-2019
Figure 13 China Is The Major Consumer While Dop Is The Largest Sub-Type For Plasticizers
Figure 14 China Commands Over One-Fourth Of The Market
Figure 15 DOP And Dinp/Didp Segments Collectively Account For More Than Half Of The Market Size
Figure 16 Dotp And Bio-Based Non-Phthalate Segments Unravel New Revenue Pockets In The Market
Figure 17 Row Market May Soon Experience An Exponential Growth
Figure 18 Increasing Demand From Emerging Markets Is Expected To Propel Plasticizers Market Growth
Figure 19 Backward Integration: Raw Materials Adding Significant Cost To The Final Product
Figure 20 Overview Of Plasticizers Value Chain
Figure 21 Porter's Five Forces Analysis Of The Plasticizers Market
Figure 22 Type Of Plasticizers
Figure 23 Non-Phthalate Plasticizers To Have The Highest Growth In The Plasticizers Market
Figure 24 Non-Phthalate Plasticizers To Witness High Value Growth
Figure 25 Asia-Pacific At The Forefront In Terms Of Consumption Of Low Phthalates
Figure 26 Stringent Regulations & Environmental Awareness To Push The Demand For Non-Phthalates Globally
Figure 27 Dotp Is The Fastest Growing Segment Being Closely Followed By Bio-Based Segment
Figure 28 Countries In Asia-Pacific Dominate The Dop Consumption Of, Led By China
Figure 29 China Is The Largest Consumer Of Dinp/Didp
Figure 30 Chinese Consumption For Dotp Is Estimated To Almost Double In Five Years (2014-2019)
Figure 31 U.S. At The Forefront In Terms Of Consumption Of Bio-Based Plasticizers
Figure 32 Regional Snapshot--Rapid Growth Markets Are Emerging As New Hotspots
Figure 33 India And Brazil- An Attractive Destination For Major Type
Figure 34 Asia-Pacific Plasticizers Market Snapshot- China Is The Most Lucrative Market
Figure 35 Dotp Is Witnessed To Be The Fastest Growing Market In Europe
Figure 36 U.S. Is The Key Market For The Plasticizers Market In North America
Figure 37 Companies Adopted Expansion & Marketing Activities As The Key Growth Strategy Over The Last Three Years
Figure 38 Yearly Market Developments Matrix: Year 2013 Experiencing Maximum Number Of Developments
Figure 39 Battle For Market Share: Expansions & Marketing Activities Was At The Forefront
Figure 40 Plasticizers Market: Growth Strategies, By Geography, 2011-2014
Figure 41 Plasticizers: Market Activity Share, By Leading Market Participants, 2011 - 2014
Figure 42 Market Penetration Of Major Players, By Region
Figure 43 Upc Technology Corporation.: Business Overview
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