

# TPE Compounders

1st Edition



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*A review of  
Europe's  
largest  
players*

*A complete analysis  
from leading global  
plastics industry consultants::*

- Corporate status and market development analysed
- Financial data
- Complete listings of TPE compounding plants in Europe
- TPE compounding activities outside of Europe
- Products manufactured and markets served

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REPORT

**Europe**



# CORPORATE PERFORMANCE AND OWNERSHIP AMONG TPE COMPOUNDERS A REVIEW OF CHINA'S 50 LEADING PLAYERS

## WHAT'S INSIDE...

Thermoplastic elastomers (TPEs) are the most diverse family of materials within the plastics processing sector. Whilst in volume terms they represent less than 8% of compounds produced in Europe the growth, inter-material competition and new product and application development has led to a high level of market activity and interest.

European output of TPEs accounts for over half a million tonnes of compound per year, excluding in-house production. This covers all the COPE, COPA, TPU, TPV and SEBS compounds and some olefinic, PVC and SBS compounds where they are thermoplastic and can be considered to be elastomeric. SBS for bitumen modification is not included.

The supply of TPEs is a fragmented one, the largest five suppliers in Europe account for less than 30% of industry volume, additionally major differences exist between the supply structures of the TPE product families. The higher value TPE compounds (TPU, COPE, COPA) tend to have fewer suppliers and those suppliers tend to be resin-integrated. The lower value compounds tend to have rather more suppliers and those suppliers tend to be independent companies. Some TPE compounders focus solely on one compound family whilst others have developed a multi-polymer portfolio.

Applied Market Information Ltd has followed the rise in demand for TPE compounds and analysed the market in depth (previously published in a separate report). This new report aims to provide an analysis of the background, strategies and financial performance of 45 of the leading companies involved in supplying TPE compounds in Europe. Whilst the geographical focus is EU member countries, Turkey has historically been a significant market for TPEs because of its established shoe industry. Turkish compounders are now developing product portfolios to serve a wider range of markets and exports to the EU are increasing. Therefore one Turkish compounder has also been included in this report. Users of the report should be clear that the focus of report is on companies that supply TPE compounds to plastics processors rather than in-house compounders.

### Market data

A complete overview of the trends and developments in TPE compounding. The comprehensive introduction also analyses the leading companies by polymer throughput.

### Corporate details

Head office address, telephone and fax numbers, e-mail and web addresses

### Ownership details

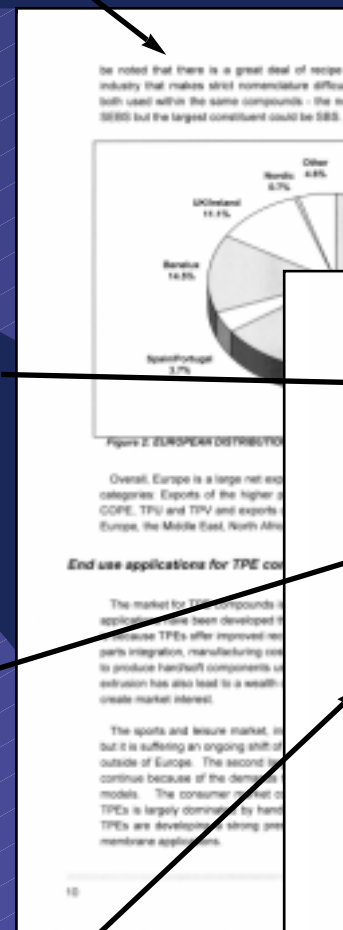
Name of the ultimate holding company or whether or not publicly or privately held.

### Background

A detailed review of the company's development to date in TPE compounding, including recent corporate changes and investments

### Financial results

Financial results for the period 2001-2004 (where available) with estimates of the proportion of business in TPE compounds in Europe.



### Map

Shows location of plants across Europe

### TPE manufacturing operations in Europe

Detailed listing of all plants operated in Europe showing location (town, country) and estimated polymer usage.

### Product line

Details of the types of TPE compounds manufactured (e.g. SBS, SEBS, COPA, COPE, TPVs etc).

### Markets served

The main end use applications for the company's range of TPE compounds (e.g. shoe industry, packaging, automotive, domestic appliances etc).

### Non-European TPE operations

Indications of where in the rest of the world the company operates.

### Other thermoplastic activities

An indication of the company's involvement in other plastics-related activities.

### Report Format

The report is published as a single volume A4 paperback report

### Who should buy this report

This report is of relevance to all companies involved in the polyethylene film extrusion business:

- For the **TPE compounder** it will provide useful benchmark information for you to review your own business and see how you compare with Europe's best. It will also be invaluable to those contemplating expansions or a change in corporate strategy.

- For **suppliers** to the TPE compound industry it will give unrivalled marketing information on the size and structure of the industry so that you can better understand your customers.

This report will also be of relevance to **investors and analysts**, which follow trends and developments in the European plastics and chemical industries.



