

**PHTHALIC ANHYDRIDE &
DERIVATIVES (PLASTICIZERS,
UNSATURATED POLYESTER RESINS
& ALKYD RESINS) MARKET**

**BY APPLICATION — Global Market
Trends & Forecast to 2018**



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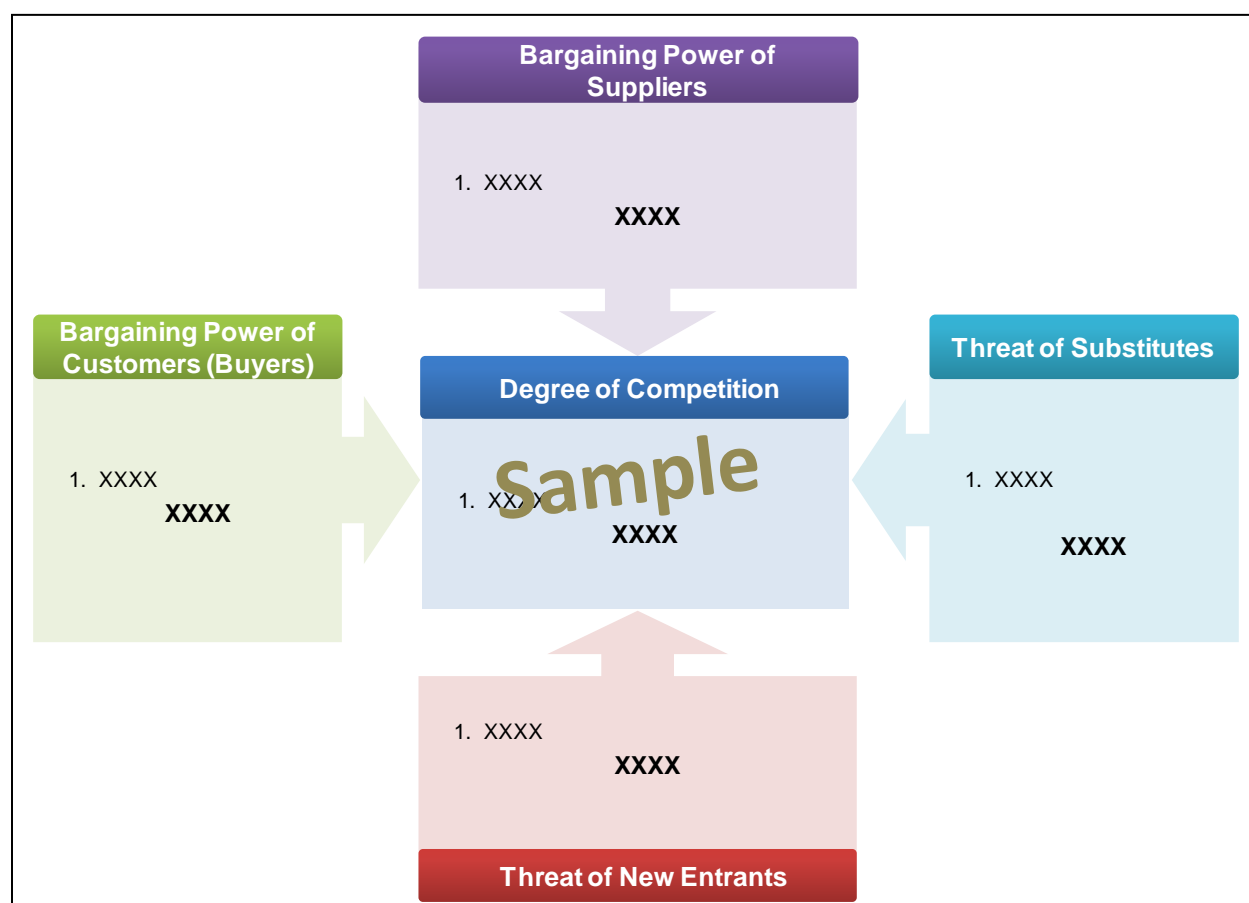
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1 MARKET OVERVIEW

1.1 PORTER'S FIVE FORCES ANALYSIS

FIGURE 1

PORTER'S FIVE FORCES ANALYSIS



Source: Company Website, Primary Interviews, Annual Reports, Chemical Weekly, and MarketsandMarkets Analysis

2 PHTHALIC ANHYDRIDE MARKET, BY DERIVATIVES

2.1 INTRODUCTION

TABLE 1

**PHTHALIC ANHYDRIDE MARKET SIZE, BY DERIVATIVE,
2011-2018 (KT)**

Derivative	2011	2012	2013	2018	CAGR% (2013-2018)
Plasticizers	XX	XX	XX	XX	XX
Unsaturated Polyester Resins	XX	XX	XX	XX	XX
Alkyd Resins	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Company Website, Annual Reports, Primary Interviews, Factiva, Chemical Weekly, and MarketsandMarkets Analysis

Plasticizers segment was the largest derivative of PA, which was about XX% of the global demand in 2012. The expected growth in demand of phthalic anhydride for plasticizers is estimated at a CAGR XX% from 2013 to 2018. The application of these plasticizers in PVC (having application in household, industrial, and automotive industry) continues to drive the demand for the same. Both UPR and alkyd resins were able to register significant shares of XX% and XX% respectively in 2012. The growth rate for alkyd resins is higher among the three applications; however, due to tighter regulations for paint formulations, the growth in demand of phthalic anhydride for the same is expected to increase at relatively slower pace during the estimation period.

3 PHTHALIC ANHYDRIDE MARKET, BY GEOGRAPHY

3.1 INTRODUCTION

TABLE 2

**PHTHALIC ANHYDRIDE MARKET SIZE, BY GEOGRAPHY,
2011-2018 (KT)**

Region	2011	2012	2013	2018	CAGR% (2013-2018)
Asia-Pacific	XX	XX	XX	XX	XX
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
ROW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Company Website, Annual Reports, Primary Interviews, Factiva, Chemical Weekly, and MarketsandMarkets analysis

The global phthalic anhydride market was estimated at XX KT in 2012, and is projected to grow at a CAGR XX% from 2013 to 2018. With an estimated demand of XX KT (XX% share) in 2012, the Asia-Pacific region leads the global phthalic anhydride market. The shares of other regions, such as North America, Europe, and ROW were estimated to be less than XX% in 2012.

3.2 EUROPE

TABLE 3

EUROPE: PHTHALIC ANHYDRIDE MARKET SIZE, BY COUNTRY, 2011-2018 (KT)

Country	2011	2012	2013	2018	CAGR% (2013-2018)
Germany	XX	XX	XX	XX	XX
The Netherlands	XX	XX	XX	XX	XX
Italy	XX	XX	XX	XX	XX
Turkey	XX	XX	XX	XX	XX
France	XX	XX	XX	XX	XX
Austria	XX	XX	XX	XX	XX
Poland	XX	XX	XX	XX	XX
Spain	XX	XX	XX	XX	XX
U.K.	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: Company Website, Annual Reports, Primary Interviews, Factiva, Chemical Weekly, and MarketsandMarkets analysis

In 2012, the demand of PA in Europe was estimated at XX KT, with a CAGR of XX% from 2013 to 2018. The slow growth rate is expected to remain mainly due to the shift to phthalate-free products and sluggish economic growth. Germany is estimated to house the largest demand for PA within the region, with an estimated demand of XX KT in 2012. For rest of the countries, apart from The Netherlands and Italy, the demand of PA was estimated to be less than XX KT

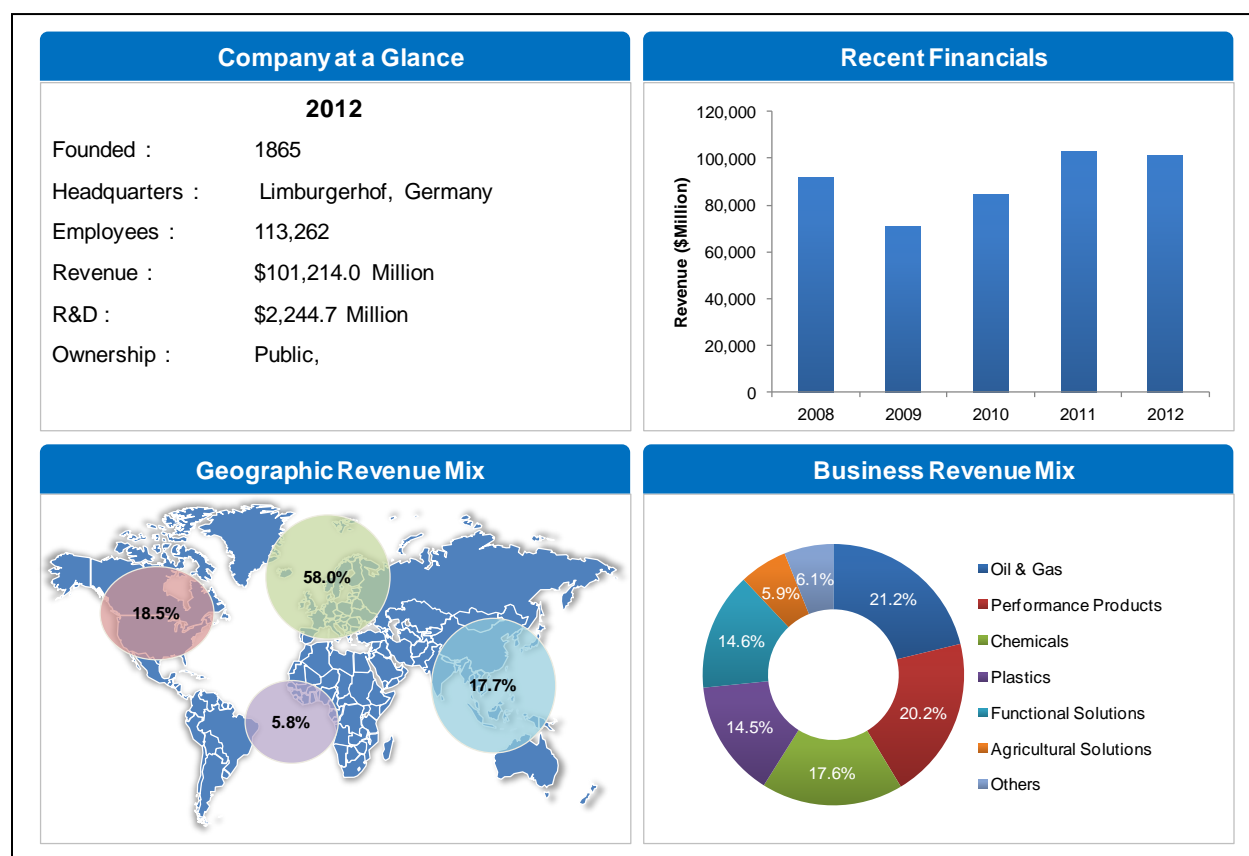
in 2012. The region had an estimated annual production capacity of XX KT in 2013. Due to the closure of Arkema's PA plant in Chauni (France) on account of decreased profitability, the existence of other plants in the region is now uncertain.

4 COMPANY PROFILES

4.1 BASF S.E.

4.1.1 OVERVIEW

BASF SE provides its products and services for a wide spectrum of applications and processes that play a vital role in their respective industries. These products include phthalic anhydride, plasticizers, solvents, battery materials, and others.



Source: Company Annual Report

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