



*New for Spring 2008 - Twelfth Biannual Edition*

# Intelligence Report

Business Shifts in the Global Catalytic Process Industries 2007-2013

Our 2008 bi-annual edition of the catalyst industry's "gold standard" for documenting market statistics, technology development and strategic insights will feature **more application- and region-specific catalyst consumption and pricing data than ever before, achieved through an expanded industry model and refinements to the numerous factors affecting growth**, including end-use production volumes, market pricing, regional capacity utilization and catalyst productivities (as defined by age/generation of technology employed, change-out cycles, etc.). The end result will be a more detailed, informative and analytical depiction of the dynamics of the industry, its players and suppliers, than ever before.

As in the past, the 2008 edition will address technology changes and competitive factors in the catalytic process industries, **with an emphasis on developments leading to new routes to products, improved process economics and/or higher value-added products meeting elevated performance or environmental specifications.**

New business and technology perspectives in the 12<sup>th</sup> edition include:

- Comprehensive, concise and more detailed than ever industry statistics on catalyst volumes and values, including forecasts
- Producer- and user-specific developments in production and technology, including alliances, ventures and acquisitions/divestitures
- Identification of new growth opportunities across the value chain (raw materials, catalysts, licensing, etc.)
- Assessment of geographical, technological and competitive gaps
- Analysis and recommendations leading to specific actionable items

Market and technology intelligence, commercial insight, business strategies and value-added new management ideas are a sample of the benefits provided by our "Intelligence Report" series. Just as we have for the past 20 years, TCGR will continue to supply the leading-edge information required to successfully sustain and grow your business in today's dynamic marketplace.

Each biannual edition of the report dedicates a section (see VII highlighted below) to an area of catalysis which is of particular interest or importance. In the past, we have focused on emerging geographical markets for catalysts including FSU and India (in 2006) and gas-to-liquids/gas-to-chemicals developments (in 2004).

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This edition's "Special Feature" section will address frontiers in syngas conversion to fuels and chemicals. It will go beyond standard technology descriptions to address "step-change" or transformational applications of syngas in hydroformylation (e.g., to alcohols, aldehydes, etc.), where new applications are emerging. The methanol-to-olefins (MTO) route has, to date, been uneconomic, but technology gains, coupled with feedstock from Mega-Methanol plants, may result in competitive olefins for chemicals and fuels (e.g., conversion to diesel or gasoline). A comparison of dimethyl ether (DME) to methanol, in production as well as shipping and end-use application, may lead to rapid DME expansion (even beyond the PRC route from coal).

The Catalyst Group Resources, Inc. (TCGR) is pleased to announce the biannual publication of the "Intelligence Report: Business Shifts in the Global Catalytic Process Industries 2007-2013," the twelfth edition of the series produced since 1986. From the inception, these reports have been recognized as the standard in the industry and have been consistently quoted by the press, e.g., *Chemical Week*, *Chemical & Engineering News*, etc., as well as other publications. These reports have evolved and have been re-scoped based on our clients' needs. This report has been used by leaders in the refining, petrochemical, environmental and polymer industries to successfully conduct their business, as well as provide them with competitive benchmarking strategies and insight into this dynamic marketplace.

## A Review of Some of Our Past Analysis and Predictions

*The eleventh edition (2006) highlighted Emerging Geographical Markets for Catalysts – The former Soviet Union (FSU) and India, including catalyst production and technology R&D (by country/region and application). Data and insights have been long-sought but not elsewhere available from established sources.*

*The tenth edition (2004) documented the increasingly important role of catalyst and process changes in gas-to-liquids (GTL) and gas-to-chemicals (GTC) technologies. Although still heavily dependent upon massive capital investments, significant savings can be realized from latest developments, making the products economically competitive.*

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