TABLE I

THE WORLD MARKET FOR CAPACITOR AROCLOR

Total Potential and Monsanto Share
1966 and 1971 (Estimated)

Metric Tons

DOMESTIC MARKETS

	1966		1971	
	Total	Monsanto Share	Total	Monsanto Objective
USA	11,000	11,000	13,000	13,000
UK	930	930	1,400	1,400
France	515	0	1,000	0
Germany	1,100	0	1,400	0
Japan	1,700	0	3,300	0
Total	15,245	11,930	20,100	14,400

NON-DOMESTIC MARKETS

EFTA	740	285	925	500
EEC	1,370	200	1,850	0
E. Europe	305	90	725	300
Asia-Pacific	330	235	665	500
Rest of Americas	1,035	975	1,940	1,900
Rest of World	370	100	600	400
Total	4,150	1,885	6,705	3,600
Grand Total	19,395	13,815	26,805	18,000

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TABLE II

NON-DOMESTIC MARKETS FOR CAPACITOR AROCLOR

BY AREA - BY COUNTRY

Metric Tons

EFTA

	1966	1971
Austria	70	80
Denmark	25	45
Finland	95	100
Norway	30	50
Sweden	290	350
Switzerland	230	300
Total	740	925

EEC

	1966	1971
Italy	800	1,050
Belgium	350	500
Holland	220	300
Total	1,370	1,850

EASTERN EUROPE

	1966	1971
Czechoslovakia	20	45
East Germany	100	200
Hungary	15	50
Poland	70	200
Romania	15	100
Yugoslavia	85	130
Total	305	725

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TABLE II (continued)

NON-DOMESTIC MARKETS FOR CAPACITOR AROCLOR

BY AREA - BY COUNTRY

Metric Tons

ASIA-PACIFIC

	1966	1971
Australia	170	350
India	150	300
Hong Kong	10	15
Total	330	665

REST OF THE AMERICAS

	1966	1971
Argentina	100	380
Brazil	250	450
Mexico	135	360
Canada	550	750
Total	1,035	1,940

REST OF THE WORLD

	1966	1971
Israel	30	50
South Africa	0	50
Spain	340	500
Total	370	600

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TABLE III

ESTIMATED WORLD PRODUCTION CAPACITY*

TOTAL AROCLORS

		Million Pounds	Tons
USA	Monsanto	80	36,200
France	Prodelec	10	4,600
UK	MCL	10	4,600
Germany	Bayer	10	4,600
Italy	Caffaro	2	1,000
Spain	Flix	1	500
Japan	Kanegafuchi	7	3,500
		120	55,000

*Also produced in East Germany and Russia

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TABLE IV

KNOWN WORLD MARKET BY PRODUCER - 1966

(Metric Tons)

	M.C.L.	BAYER	PRODELEC	CAFFARO	FLIX	KANEGA-FUCHI	M.C.	TOTAL
MAJOR DOMESTIC MARKETS	930	1,100	515	0	- 0	1,700	11,000	15,245
E.F.T.A.	220	155	365	0	0	0	0	740
E.E.C.	200	805	300	65	0	0	0	1,370
E. EUROPE	90	115	100	0	0	0	0	305
ASIA-PACIFIC	210	50	50	0	0	0	20	330
REST OF AMERICAS	0	50	0	0	0	0	985	1,035
REST OF WORLD	90	0	30	0	250	0	0	370
TOTAL	1,740	2,275	1,360	65	250	1,700	12,005	19,395

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TABLE V

ELECTRICAL AROCLOR

TABLE OF COMPETITIVE STRENGTHS

	MCL/MC	BAYER	PRODELEC	CAFFARO
R.M.POSITION				
Benzene	Buy/Make	Buy	Buy (Progil)	Buy
Chlorine	Make	Make	Make (Progil)	Make
PROD. QUALITY				
1254	Good/Fair	Good	Good	Good
1242	Fair/Fair	Good	Good	Fair
ANALYTICAL	Adequate	Adequate	Adequate	Adequate
DATE PROD. STARTED	1951/1930	1930	1938-1939	Post 1945
Years	14 35	35	27	
PRODUCT RANGE	Very large	Very large	Limited (Progil)	Limited
SALES ORGANIZATION				
Strength	Good	Good	Good	Italy only - Weak
Method	Direct/Agents	Direct/Agents	Direct/Agents	Direct
Visit Frequency		Europe more than MCL	Europe more than MCL	Italy OK
Customer Relations	Much respect	Much respect	Much respect	Bit amateur
TECHNICAL SERVICE	Good	Good	Good	Not as good as Big Three
OTHER ASSETS	EFTA (Large Comp.)	EEC (Large Comp.)	EEC (Progil)	Local
SUPPLY SITUATION	Drums OK	Drums OK	Drums OK	Drums OK
	Bulk ?	Bulk Good	Bulk Good	

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	MCL/MC	BAYER	PRODELEC	CAFFARO
RESEARCH EFFORT	Needs MC/MCL liaison	Not obviously energetic	Very active	Non-existent
NEW PRODUCTS	Yes	No	Very active (1500)	No
AROCLOR IMPORTANCE (±%)	Small but valuable	Small but valuable	Large	Medium
PRICE LEADERS/ CUTTERS	Stability	Stability	Leaders	Cutters
PHILOSOPHY	Common schedule	Common schedule	Common schedule	To capacity

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