

Global Polyether Polyols Market Outlook to 2027

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Abstracts

Polyether polyols are polymers produced by reacting monomers of propylene oxide or ethylene oxide with an initiator (water, sorbitol, glycerine). According to BlueQuark Research & Consulting, the global Polyether polyols market is expected to witness a considerable growth rate during the forecast period. The increasing usage of polyether polyols in the construction and automotive industries is driving the consumption of the global polyols market. However, the stringent regulations on polyurethane foam manufacturing are likely to act as a restraint to the market growth. The demand for polyether polyol is majorly used in PU rigid foam, soft foam, and molding foam products.

Polyurethane is an advanced material formed by the chemical reaction of a di- or polyisocyanate with a polyol (either polyether or polyester). The characteristics of polyurethane depend on the blending of the polyol component and additives. Polyurethanes are used in a broad range of applications in numerous end-user industries, including furniture, construction, automotive, and electronics, among others. The consumption of polyurethane is driven by considerable trends like population growth, climate change, and urbanization. In the furniture industry, applications of polyurethane include upholstered furniture cushions, carpet cushions, mattresses, and interior trim, all based on flexible foams. Whereas in the automotive industry, polyurethane is an integral part of automotive seats, body panels, head & armrests, steering wheels, acoustic foams, headliners, various seals, door panels, spoilers, and rear shelves.

In the construction industry, due to increasing demand, polyurethane is used due to its high energy efficiency, wide capacity for decorative design, and low emissions. The insulation property of polyurethane makes it an important material in the electrical & electronics industry. Polyurethane is also a preferred insulating material for cooling units of refrigerated containers and displays. It represents a cost-effective material for the production of housings for sensitive electronic components. Compared to conventional

materials, polyurethane is being adopted in several applications due to its relatively superior characteristics. The superior performance of polyurethane is driving the growth in the demand from various end-user industries. The increasing market for polyurethane is anticipated to have a direct impact on the consumption of polyether polyols.

The production of PPG (polypropylene glycol) polyether polyols with DMC technology is relatively cheap. PPGs are very widely used, particularly in CASE applications (coatings, adhesives, sealants, and elastomers). A catalyst is used for the synthesis of PPG polyether polyols, with KOH (potassium hydroxide) having been the traditional choice. However, the technology does not allow for the production of high molecular weights. It generates a higher presence of monol and unsaturated polyols during the process, thus reducing functionality and potentially increasing emissions of volatile organic compounds (VOCs) during the subsequent synthesis of polyurethanes.

The global Personal protective equipment market is segmented based on Type and End-use. The End-User segment is further segmented as Construction, furniture & bedding, Automotive, Packaging, Electrical & Electronics, and others. Between rigid and flexible types of polyether polyols, rigid type is majorly used in the construction industry due to its high insulation property, and flexible type is used in applications where cushioning is desired, such as furniture, bedding, and seats, etc.

Polyether polyols are a vital component in the production of rigid foams. These foams are used in insulation panels, structural and decorative molded products. The major type of polyether polyols used in the construction industry is rigid form compared to other forms. Rigid foam can help save homeowners money, both in terms of lower utility bills and reduced construction costs. In addition to this, polyether polyols are also helpful in reducing greenhouse gas emissions as green polyol and have improved indoor air quality.

Polyurethanes made from polyether polyols find their applications as insulation in walls, roofs, and floors, as sealants and foams around windows and doors, medium-density fiberboard sheets, oriented strand board sheets, and as waterproof protective coatings. The rigid foams made of polyether polyols used in modern construction methods increase not only the amount of living space (owing to its relative thinness) but also reduces energy and costs. The above-mentioned environmental benefits with the deployment of polyether polyols-based polyurethane are likely to propel their consumption in the construction industry. The increasing adoption of polyether polyols-based polyurethane in the construction industry owing to its superior properties is likely

to propel their consumption during the forecast period.

Based on geography, the global Polyether polyols market is segmented into Asia Pacific, North America, South America, Europe, and Middle East & Africa. Asia Pacific was found to be the largest regional market for polyether polyols globally and is expected to continue its domination during the forecast period. China leads the market for polyether polyols in the region. The market in the region is likely to be supported by the presence of a large density of population and growing middle-class incomes. This is expected to support consumer spending, thus driving the growth in end-user industries.

With the ongoing Covid-19 pandemic in the United States, the GDP growth rate for the first quarter of 2020 was -4.8% compared to the growth rate of 2.1% in the fourth quarter of 2019. The construction industry is a major contributor to the country's economy. Construction is one of the largest customers for mining, manufacturing, and a variety of services. In the country, metropolitan areas that recently witnessed strong construction markets include New York, Boston, Dallas, Miami, Austin, Houston, Chicago, San Antonio, Los Angeles, San Diego, San Francisco, Washington D.C., and Seattle. The residential market in Phoenix remains vigorous. The spending growth in the coming years is expected to be led by public institutions and infrastructure investments across both non-residential and residential structures.

The electronics industry of the United States contributes about 3.7% to the country's GDP. States with higher than average contribution to GDP from electronic manufacturing include California, Oregon, Massachusetts, North Carolina, Minnesota, Arizona, Texas, Colorado, and Wisconsin. The largest subsectors in the country's electronic manufacturing are computer and peripheral equipment manufacturing, semiconductor, and other electronic component manufacturing, followed by navigational, measuring, electromedical, and control instruments manufacturing. The covid-19 pandemic is being felt by the U.S. electronics manufacturing industry. The electronics manufacturing industry is facing diverse challenges, including changing demand patterns, unclear and evolving operating restrictions, and abnormalities in supply chains. The automotive production in the country has witnessed a declining trend from 2016 to date. This trend is likely to continue in the short-term, hindering the overall consumption of polyether polyols. The packaging industry has been growing at a considerable rate in the country. The ongoing crisis due to covid-19 is likely to boost the packaging sector, thus driving the market for polyether polyols in the long-run.

The global polyether polyol market is partially consolidated with the top 5 players accounting for about 50% of the market share. The major key players in the global

market include The Dow Chemical Company , Royal Dutch Shell , Covestro , BASF SE , and Huntsman International LLC , among others.

On 06th May 2020, BASF's management and employee representatives signed a new site agreement that will run for five and a half years. The agreement states that an annual average of about EUR 1.5 billion will be spent at the Ludwigshafen site each year until 2025.

In January 2020, The Dow Chemical Company announced the price increase of EUR 100 per metric ton for all polyols in Europe, the Middle-East & Africa, and India. The decision was driven by increasing margin compression across key market segments.

In Oct 2019, Aalchem partnered with a new supplier of polyether polyols, MCNS. MCNS is a South Korean company that was established in 2015 with the merger of SKC and Mitsui Chemicals. MCNS produces polyether polyols, MDI and TDI.

Our Global Polyether Polyols market research report provides deep insight into the current and future state of the Polyether Polyols market across various regions. Also, the study comprehensively analyzes the Polyether Polyols market by segments based on type (Rigid, Flexible, and Others), By End-use (Construction , furniture & bedding, Automotive, Packaging , Electrical & Electronics, and others), and by Geography (Asia Pacific, North America, Europe, South America, and Middle-East and Africa). The report examines the market drivers and restraints, along with the impact of Covid-19 are influencing the market growth in detail. The study covers & includes emerging market trend, market developments, market growth opportunities, market size, market swot analysis, market revenue, market dynamics, and challenges in the industry. This report also covers extensively researched competitive landscape sections with profiles of major companies, including their market share and projects.

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