

Global ABS PC in Automotive Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on ABS PC in Automotive competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. ABS/PC (Acrylonitrile-Butadiene-Styrene/Polycarbonate) is a polymer blend widely used in the automotive industry. It combines the strengths of two plastics: ABS (Acrylonitrile-Butadiene-Styrene): Good toughness, processability, and surface finish. PC (Polycarbonate): High impact strength, heat resistance, and dimensional stability. When blended, ABS/PC delivers a material with balanced mechanical strength, heat performance, chemical resistance, and surface quality, making it ideal for automotive parts that need both durability and aesthetics. In 2024, global ABS PC in Automotive sales volume reached approximately 1,965 k tons, with an average global market price of around 1,890 US\$ per ton. The blend of Acrylonitrile-Butadiene-Styrene (ABS) and Polycarbonate (PC) has become one of the most widely used engineering plastics in the automotive industry. Known as ABS/PC, this polymer alloy combines the toughness and processability of ABS with the impact resistance and heat stability of PC, making it ideal for interior, exterior, and electronic vehicle components. The industry chain of ABS/PC in the automotive sector stretches from petrochemical raw materials to resin compounding, component manufacturing, and integration into final vehicles.

1. Upstream: Raw Materials
The first stage of the ABS/PC industry chain involves the production of the key monomers and intermediates required to make ABS and PC.
ABS requires: Acrylonitrile (derived from propylene and ammonia) Butadiene (a byproduct of naphtha cracking, C4 stream) Styrene monomer (from benzene and ethylene)
PC requires: Bisphenol-A (BPA) (from phenol and acetone) Phosgene or diphenyl carbonate (for polymerization of PC)
These monomers are produced by petrochemical and chemical companies such as BASF, Dow, INEOS, Sinopec, and Mitsubishi Chemical.

Their stability and purity are essential because they directly affect the properties of the final ABS/PC resins.

2. Midstream: Resin Production and Compounding

In the midstream stage, ABS and PC resins are manufactured separately and then blended into ABS/PC alloys tailored for automotive needs.

Resin Production:

ABS and PC are synthesized through polymerization.

Compounding:

The resins are blended in controlled ratios (commonly 40% PC and 60% ABS) along with additives such as: UV stabilizers for outdoor durability, flame retardants for EV battery covers and electronics, glass fibers for reinforcement, colorants and flow modifiers for design flexibility. The result is a wide range of grades: standard, high-heat, UV-stabilized, low-gloss, electroplatable, and recycled ABS/PC.

Key resin and compound producers include:

Covestro (Makroblend), SABIC (Cycloy), LG Chem (LUPOY PC/ABS), Chi Mei Industrial (Polylac blends), Trinseo (EMERGE resins). These companies supply compounded materials to Tier 1 and Tier 2 automotive suppliers worldwide.

3. Downstream: Component Manufacturing

At the downstream stage, Tier 1 and Tier 2 automotive suppliers process ABS/PC into finished components using injection molding, extrusion, or plating techniques.

Interior applications:

dashboards, glove boxes, center consoles, trims, air vents, instrument clusters.

Exterior applications:

grilles, mirror housings, roof rail covers, spoilers, lighting bezels.

Electrical & EV applications:

battery housings, charging ports, infotainment housings, switches, electronic control modules.

ABS/PC offers excellent impact resistance, lightweighting, and design flexibility, which makes it especially valuable in modern vehicles where sustainability and fuel efficiency are key design priorities.

The global ABS PC in Automotive market size was estimated at USD 3714.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 5.40% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global ABS PC in Automotive market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global ABS PC

in Automotive market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the ABS PC in Automotive market.

Global ABS PC in Automotive Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

SABIC

LG Chem

Trinseo

Toray

Formosa Chemicals

CHIMEI

Lotte Chemical

CNPC

INEOS Styrolution

Dagu Chemical

Market Segmentation (by Type)

High-Heat Type

UV-Stabilized Type

Other

Market Segmentation (by Application)

Automotive Interior

Automotive Exterior

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the ABS PC in Automotive Market

Overview of the regional outlook of the ABS PC in Automotive Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product

type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the ABS PC in Automotive Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of ABS PC in Automotive, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development

potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of ABS PC in Automotive
- 1.2 Key Market Segments
 - 1.2.1 ABS PC in Automotive Segment by Type
 - 1.2.2 ABS PC in Automotive Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats

2 ABS PC IN AUTOMOTIVE MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global ABS PC in Automotive Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global ABS PC in Automotive Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 ABS PC IN AUTOMOTIVE MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global ABS PC in Automotive Product Life Cycle
- 3.3 Global ABS PC in Automotive Sales by Manufacturers (2020-2025)
- 3.4 Global ABS PC in Automotive Revenue Market Share by Manufacturers (2020-2025)
- 3.5 ABS PC in Automotive Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global ABS PC in Automotive Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 ABS PC in Automotive Market Competitive Situation and Trends
 - 3.8.1 ABS PC in Automotive Market Concentration Rate
 - 3.8.2 Global 5 and 10 Largest ABS PC in Automotive Players Market Share by Revenue
 - 3.8.3 Mergers & Acquisitions, Expansion

4 ABS PC IN AUTOMOTIVE INDUSTRY CHAIN ANALYSIS

- 4.1 ABS PC in Automotive Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF ABS PC IN AUTOMOTIVE MARKET

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
 - 5.4.1 New Product Developments
 - 5.4.2 Mergers & Acquisitions
 - 5.4.3 Expansions
 - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
 - 5.5.1 Industry Policies Analysis
 - 5.5.2 Economic Environment Analysis
 - 5.5.3 Social Environment Analysis
 - 5.5.4 Technological Environment Analysis
- 5.6 Global ABS PC in Automotive Market Porter's Five Forces Analysis
 - 5.6.1 Global Trade Frictions
 - 5.6.2 U.S. Tariff Policy ? April 2025
 - 5.6.3 Global Trade Frictions and Their Impacts to ABS PC in Automotive Market
- 5.7 ESG Ratings of Leading Companies

6 ABS PC IN AUTOMOTIVE MARKET SEGMENTATION BY TYPE

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global ABS PC in Automotive Sales Market Share by Type (2020-2025)
- 6.3 Global ABS PC in Automotive Market Size by Type (2020-2025)
- 6.4 Global ABS PC in Automotive Price by Type (2020-2025)

7 ABS PC IN AUTOMOTIVE MARKET SEGMENTATION BY APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)

- 7.2 Global ABS PC in Automotive Market Sales by Application (2020-2025)
- 7.3 Global ABS PC in Automotive Market Size (M USD) by Application (2020-2025)
- 7.4 Global ABS PC in Automotive Sales Growth Rate by Application (2020-2025)

8 ABS PC IN AUTOMOTIVE MARKET SALES BY REGION

- 8.1 Global ABS PC in Automotive Sales by Region
 - 8.1.1 Global ABS PC in Automotive Sales by Region
 - 8.1.2 Global ABS PC in Automotive Sales Market Share by Region
- 8.2 Global ABS PC in Automotive Market Size by Region
 - 8.2.1 Global ABS PC in Automotive Market Size by Region
 - 8.2.2 Global ABS PC in Automotive Market Size by Region
- 8.3 North America
 - 8.3.1 North America ABS PC in Automotive Sales by Country
 - 8.3.2 North America ABS PC in Automotive Market Size by Country
 - 8.3.3 U.S. Market Overview
 - 8.3.4 Canada Market Overview
 - 8.3.5 Mexico Market Overview
- 8.4 Europe
 - 8.4.1 Europe ABS PC in Automotive Sales by Country
 - 8.4.2 Europe ABS PC in Automotive Market Size by Country
 - 8.4.3 Germany Market Overview
 - 8.4.4 France Market Overview
 - 8.4.5 U.K. Market Overview
 - 8.4.6 Italy Market Overview
 - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
 - 8.5.1 Asia Pacific ABS PC in Automotive Sales by Region
 - 8.5.2 Asia Pacific ABS PC in Automotive Market Size by Region
 - 8.5.3 China Market Overview
 - 8.5.4 Japan Market Overview
 - 8.5.5 South Korea Market Overview
 - 8.5.6 India Market Overview
 - 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America ABS PC in Automotive Sales by Country
 - 8.6.2 South America ABS PC in Automotive Market Size by Country
 - 8.6.3 Brazil Market Overview
 - 8.6.4 Argentina Market Overview

8.6.5 Columbia Market Overview

8.7 Middle East and Africa

8.7.1 Middle East and Africa ABS PC in Automotive Sales by Region

8.7.2 Middle East and Africa ABS PC in Automotive Market Size by Region

8.7.3 Saudi Arabia Market Overview

8.7.4 UAE Market Overview

8.7.5 Egypt Market Overview

8.7.6 Nigeria Market Overview

8.7.7 South Africa Market Overview

9 ABS PC IN AUTOMOTIVE MARKET PRODUCTION BY REGION

9.1 Global Production of ABS PC in Automotive by Region(2020-2025)

9.2 Global ABS PC in Automotive Revenue Market Share by Region (2020-2025)

9.3 Global ABS PC in Automotive Production, Revenue, Price and Gross Margin (2020-2025)

9.4 North America ABS PC in Automotive Production

9.4.1 North America ABS PC in Automotive Production Growth Rate (2020-2025)

9.4.2 North America ABS PC in Automotive Production, Revenue, Price and Gross Margin (2020-2025)

9.5 Europe ABS PC in Automotive Production

9.5.1 Europe ABS PC in Automotive Production Growth Rate (2020-2025)

9.5.2 Europe ABS PC in Automotive Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan ABS PC in Automotive Production (2020-2025)

9.6.1 Japan ABS PC in Automotive Production Growth Rate (2020-2025)

9.6.2 Japan ABS PC in Automotive Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China ABS PC in Automotive Production (2020-2025)

9.7.1 China ABS PC in Automotive Production Growth Rate (2020-2025)

9.7.2 China ABS PC in Automotive Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 SABIC

10.1.1 SABIC Basic Information

10.1.2 SABIC ABS PC in Automotive Product Overview

10.1.3 SABIC ABS PC in Automotive Product Market Performance

- 10.1.4 SABIC Business Overview
- 10.1.5 SABIC SWOT Analysis
- 10.1.6 SABIC Recent Developments
- 10.2 LG Chem
 - 10.2.1 LG Chem Basic Information
 - 10.2.2 LG Chem ABS PC in Automotive Product Overview
 - 10.2.3 LG Chem ABS PC in Automotive Product Market Performance
 - 10.2.4 LG Chem Business Overview
 - 10.2.5 LG Chem SWOT Analysis
 - 10.2.6 LG Chem Recent Developments
- 10.3 Trinseo
 - 10.3.1 Trinseo Basic Information
 - 10.3.2 Trinseo ABS PC in Automotive Product Overview
 - 10.3.3 Trinseo ABS PC in Automotive Product Market Performance
 - 10.3.4 Trinseo Business Overview
 - 10.3.5 Trinseo SWOT Analysis
 - 10.3.6 Trinseo Recent Developments
- 10.4 Toray
 - 10.4.1 Toray Basic Information
 - 10.4.2 Toray ABS PC in Automotive Product Overview
 - 10.4.3 Toray ABS PC in Automotive Product Market Performance
 - 10.4.4 Toray Business Overview
 - 10.4.5 Toray Recent Developments
- 10.5 Formosa Chemicals
 - 10.5.1 Formosa Chemicals Basic Information
 - 10.5.2 Formosa Chemicals ABS PC in Automotive Product Overview
 - 10.5.3 Formosa Chemicals ABS PC in Automotive Product Market Performance
 - 10.5.4 Formosa Chemicals Business Overview
 - 10.5.5 Formosa Chemicals Recent Developments
- 10.6 CHIMEI
 - 10.6.1 CHIMEI Basic Information
 - 10.6.2 CHIMEI ABS PC in Automotive Product Overview
 - 10.6.3 CHIMEI ABS PC in Automotive Product Market Performance
 - 10.6.4 CHIMEI Business Overview
 - 10.6.5 CHIMEI Recent Developments
- 10.7 Lotte Chemical
 - 10.7.1 Lotte Chemical Basic Information
 - 10.7.2 Lotte Chemical ABS PC in Automotive Product Overview
 - 10.7.3 Lotte Chemical ABS PC in Automotive Product Market Performance

- 10.7.4 Lotte Chemical Business Overview
- 10.7.5 Lotte Chemical Recent Developments
- 10.8 CNPC
 - 10.8.1 CNPC Basic Information
 - 10.8.2 CNPC ABS PC in Automotive Product Overview
 - 10.8.3 CNPC ABS PC in Automotive Product Market Performance
 - 10.8.4 CNPC Business Overview
 - 10.8.5 CNPC Recent Developments
- 10.9 INEOS Styrolution
 - 10.9.1 INEOS Styrolution Basic Information
 - 10.9.2 INEOS Styrolution ABS PC in Automotive Product Overview
 - 10.9.3 INEOS Styrolution ABS PC in Automotive Product Market Performance
 - 10.9.4 INEOS Styrolution Business Overview
 - 10.9.5 INEOS Styrolution Recent Developments
- 10.10 Dagu Chemical
 - 10.10.1 Dagu Chemical Basic Information
 - 10.10.2 Dagu Chemical ABS PC in Automotive Product Overview
 - 10.10.3 Dagu Chemical ABS PC in Automotive Product Market Performance
 - 10.10.4 Dagu Chemical Business Overview
 - 10.10.5 Dagu Chemical Recent Developments

11 ABS PC IN AUTOMOTIVE MARKET FORECAST BY REGION

- 11.1 Global ABS PC in Automotive Market Size Forecast
- 11.2 Global ABS PC in Automotive Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe ABS PC in Automotive Market Size Forecast by Country
 - 11.2.3 Asia Pacific ABS PC in Automotive Market Size Forecast by Region
 - 11.2.4 South America ABS PC in Automotive Market Size Forecast by Country
 - 11.2.5 Middle East and Africa Forecasted Sales of ABS PC in Automotive by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

- 12.1 Global ABS PC in Automotive Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of ABS PC in Automotive by Type (2026-2035)
 - 12.1.2 Global ABS PC in Automotive Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of ABS PC in Automotive by Type (2026-2035)
- 12.2 Global ABS PC in Automotive Market Forecast by Application (2026-2035)
 - 12.2.1 Global ABS PC in Automotive Sales (K MT) Forecast by Application

12.2.2 Global ABS PC in Automotive Market Size (M USD) Forecast by Application
(2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

- Table 1. Introduction of the Type
- Table 2. Introduction of the Application
- Table 3. Global ABS PC in Automotive Market Size by Type (M USD)
- Table 4. Global ABS PC in Automotive Market Size by Application
- Table 5. ABS PC in Automotive Market Size Comparison by Region (M USD)
- Table 6. Global ABS PC in Automotive Sales (K MT) by Manufacturers (2020-2025)
- Table 7. Global ABS PC in Automotive Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global ABS PC in Automotive Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global ABS PC in Automotive Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in ABS PC in Automotive as of 2025)
- Table 11. Global Market ABS PC in Automotive Average Price (USD/KG) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global ABS PC in Automotive Manufacturers Market Concentration Ratio (CR5 and HHI)
- Table 15. Mergers & Acquisitions, Expansion Plans
- Table 16. Market Overview of Key Raw Materials
- Table 17. Midstream Market Analysis
- Table 18. Downstream Customer Analysis
- Table 19. Key Development Trends
- Table 20. Driving Factors
- Table 21. ABS PC in Automotive Market Challenges
- Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
- Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
- Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
- Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
- Table 26. Global ABS PC in Automotive Sales by Type (K MT)
- Table 27. Global ABS PC in Automotive Market Size by Type (M USD)
- Table 28. Global ABS PC in Automotive Sales (K MT) by Type (2020-2025)
- Table 29. Global ABS PC in Automotive Sales Market Share by Type (2020-2025)

- Table 30. Global ABS PC in Automotive Market Size (M USD) by Type (2020-2025)
- Table 31. Global ABS PC in Automotive Market Share by Type (2020-2025)
- Table 32. Global ABS PC in Automotive Price (USD/KG) by Type (2020-2025)
- Table 33. Global ABS PC in Automotive Sales (K MT) by Application
- Table 34. Global ABS PC in Automotive Market Size by Application
- Table 35. Global ABS PC in Automotive Sales by Application (2020-2025) & (K MT)
- Table 36. Global ABS PC in Automotive Sales Market Share by Application (2020-2025)
- Table 37. Global ABS PC in Automotive Market Size by Application (2020-2025) & (M USD)
- Table 38. Global ABS PC in Automotive Market Share by Application (2020-2025)
- Table 39. Global ABS PC in Automotive Sales Growth Rate by Application (2020-2025)
- Table 40. Global ABS PC in Automotive Sales by Region (2020-2025) & (K MT)
- Table 41. Global ABS PC in Automotive Sales Market Share by Region (2020-2025)
- Table 42. Global ABS PC in Automotive Market Size by Region (2020-2025) & (M USD)
- Table 43. Global ABS PC in Automotive Market Size by Region (2020-2025)
- Table 44. North America ABS PC in Automotive Sales by Country (2020-2025) & (K MT)
- Table 45. North America ABS PC in Automotive Market Size by Country (2020-2025) & (M USD)
- Table 46. Europe ABS PC in Automotive Sales by Country (2020-2025) & (K MT)
- Table 47. Europe ABS PC in Automotive Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific ABS PC in Automotive Sales by Region (2020-2025) & (K MT)
- Table 49. Asia Pacific ABS PC in Automotive Market Size by Region (2020-2025) & (M USD)
- Table 50. South America ABS PC in Automotive Sales by Country (2020-2025) & (K MT)
- Table 51. South America ABS PC in Automotive Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa ABS PC in Automotive Sales by Region (2020-2025) & (K MT)
- Table 53. Middle East and Africa ABS PC in Automotive Market Size by Region (2020-2025) & (M USD)
- Table 54. Global ABS PC in Automotive Production (K MT) by Region(2020-2025)
- Table 55. Global ABS PC in Automotive Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global ABS PC in Automotive Revenue Market Share by Region (2020-2025)
- Table 57. Global ABS PC in Automotive Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 58. North America ABS PC in Automotive Production (K MT), Revenue (US\$

Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 59. Europe ABS PC in Automotive Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 60. Japan ABS PC in Automotive Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 61. China ABS PC in Automotive Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 62. SABIC Basic Information

Table 63. SABIC ABS PC in Automotive Product Overview

Table 64. SABIC ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 65. SABIC Business Overview

Table 66. SABIC SWOT Analysis

Table 67. SABIC Recent Developments

Table 68. LG Chem Basic Information

Table 69. LG Chem ABS PC in Automotive Product Overview

Table 70. LG Chem ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 71. LG Chem Business Overview

Table 72. LG Chem SWOT Analysis

Table 73. LG Chem Recent Developments

Table 74. Trinseo Basic Information

Table 75. Trinseo ABS PC in Automotive Product Overview

Table 76. Trinseo ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 77. Trinseo Business Overview

Table 78. Trinseo SWOT Analysis

Table 79. Trinseo Recent Developments

Table 80. Toray Basic Information

Table 81. Toray ABS PC in Automotive Product Overview

Table 82. Toray ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 83. Toray Business Overview

Table 84. Toray Recent Developments

Table 85. Formosa Chemicals Basic Information

Table 86. Formosa Chemicals ABS PC in Automotive Product Overview

Table 87. Formosa Chemicals ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 88. Formosa Chemicals Business Overview

- Table 89. Formosa Chemicals Recent Developments
- Table 90. CHIMEI Basic Information
- Table 91. CHIMEI ABS PC in Automotive Product Overview
- Table 92. CHIMEI ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 93. CHIMEI Business Overview
- Table 94. CHIMEI Recent Developments
- Table 95. Lotte Chemical Basic Information
- Table 96. Lotte Chemical ABS PC in Automotive Product Overview
- Table 97. Lotte Chemical ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 98. Lotte Chemical Business Overview
- Table 99. Lotte Chemical Recent Developments
- Table 100. CNPC Basic Information
- Table 101. CNPC ABS PC in Automotive Product Overview
- Table 102. CNPC ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 103. CNPC Business Overview
- Table 104. CNPC Recent Developments
- Table 105. INEOS Styrolution Basic Information
- Table 106. INEOS Styrolution ABS PC in Automotive Product Overview
- Table 107. INEOS Styrolution ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 108. INEOS Styrolution Business Overview
- Table 109. INEOS Styrolution Recent Developments
- Table 110. Dagu Chemical Basic Information
- Table 111. Dagu Chemical ABS PC in Automotive Product Overview
- Table 112. Dagu Chemical ABS PC in Automotive Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
- Table 113. Dagu Chemical Business Overview
- Table 114. Dagu Chemical Recent Developments
- Table 115. Global ABS PC in Automotive Sales Forecast by Region (2026-2035) & (K MT)
- Table 116. Global ABS PC in Automotive Market Size Forecast by Region (2026-2035) & (M USD)
- Table 117. North America ABS PC in Automotive Sales Forecast by Country (2026-2035) & (K MT)
- Table 118. North America ABS PC in Automotive Market Size Forecast by Country (2026-2035) & (M USD)

Table 119. Europe ABS PC in Automotive Sales Forecast by Country (2026-2035) & (K MT)

Table 120. Europe ABS PC in Automotive Market Size Forecast by Country (2026-2035) & (M USD)

Table 121. Asia Pacific ABS PC in Automotive Sales Forecast by Region (2026-2035) & (K MT)

Table 122. Asia Pacific ABS PC in Automotive Market Size Forecast by Region (2026-2035) & (M USD)

Table 123. South America ABS PC in Automotive Sales Forecast by Country (2026-2035) & (K MT)

Table 124. South America ABS PC in Automotive Market Size Forecast by Country (2026-2035) & (M USD)

Table 125. Middle East and Africa ABS PC in Automotive Sales Forecast by Country (2026-2035) & (Units)

Table 126. Middle East and Africa ABS PC in Automotive Market Size Forecast by Country (2026-2035) & (M USD)

Table 127. Global ABS PC in Automotive Sales Forecast by Type (2026-2035) & (K MT)

Table 128. Global ABS PC in Automotive Market Size Forecast by Type (2026-2035) & (M USD)

Table 129. Global ABS PC in Automotive Price Forecast by Type (2026-2035) & (USD/KG)

Table 130. Global ABS PC in Automotive Sales (K MT) Forecast by Application (2026-2035)

Table 131. Global ABS PC in Automotive Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of ABS PC in Automotive
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global ABS PC in Automotive Market Size (M USD), 2025-2035
- Figure 5. Global ABS PC in Automotive Market Size (M USD) (2020-2035)
- Figure 6. Global ABS PC in Automotive Sales (K MT) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. ABS PC in Automotive Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global ABS PC in Automotive Product Life Cycle
- Figure 13. ABS PC in Automotive Sales Share by Manufacturers in 2025
- Figure 14. Global ABS PC in Automotive Revenue Share by Manufacturers in 2025
- Figure 15. ABS PC in Automotive Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market ABS PC in Automotive Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by ABS PC in Automotive Revenue in 2025
- Figure 18. Industry Chain Map of ABS PC in Automotive
- Figure 19. Global ABS PC in Automotive Market PEST Analysis
- Figure 20. Global ABS PC in Automotive Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global ABS PC in Automotive Market Share by Type
- Figure 27. Sales Market Share of ABS PC in Automotive by Type (2020-2025)
- Figure 28. Sales Market Share of ABS PC in Automotive by Type in 2025
- Figure 29. Market Share of ABS PC in Automotive by Type (2020-2025)
- Figure 30. Market Share of ABS PC in Automotive by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global ABS PC in Automotive Market Share by Application

- Figure 33. Global ABS PC in Automotive Sales Market Share by Application (2020-2025)
- Figure 34. Global ABS PC in Automotive Sales Market Share by Application in 2025
- Figure 35. Global ABS PC in Automotive Market Share by Application (2020-2025)
- Figure 36. Global ABS PC in Automotive Market Share by Application in 2025
- Figure 37. Global ABS PC in Automotive Sales Growth Rate by Application (2020-2025)
- Figure 38. Global ABS PC in Automotive Sales Market Share by Region (2020-2025)
- Figure 39. Global ABS PC in Automotive Market Size by Region (2020-2025)
- Figure 40. North America ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 41. North America ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 42. North America ABS PC in Automotive Sales Market Share by Country in 2024
- Figure 43. North America ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America ABS PC in Automotive Market Size by Country in 2024
- Figure 45. U.S. ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 46. U.S. ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada ABS PC in Automotive Sales (K MT) and Growth Rate (2020-2025)
- Figure 48. Canada ABS PC in Automotive Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico ABS PC in Automotive Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico ABS PC in Automotive Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 52. Europe ABS PC in Automotive Sales Market Share by Country in 2024
- Figure 53. Europe ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 54. Europe ABS PC in Automotive Market Size by Country in 2024
- Figure 55. Germany ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 56. Germany ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 57. France ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 58. France ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 59. U.K. ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific ABS PC in Automotive Sales and Growth Rate (K MT)

Figure 66. Asia Pacific ABS PC in Automotive Sales Market Share by Region in 2024

Figure 67. Asia Pacific ABS PC in Automotive Market Size by Region in 2024

Figure 68. China ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 73. South Korea ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 75. India ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 77. Southeast Asia ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America ABS PC in Automotive Sales and Growth Rate (K MT)

Figure 79. South America ABS PC in Automotive Sales Market Share by Country in 2024

Figure 80. South America ABS PC in Automotive Market Size and Growth Rate (M USD)

Figure 81. South America ABS PC in Automotive Market Size by Country in 2024

Figure 82. Brazil ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

Figure 83. Brazil ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)

- Figure 85. Argentina ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 86. Columbia ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 87. Columbia ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 88. Middle East and Africa ABS PC in Automotive Sales and Growth Rate (K MT)
- Figure 89. Middle East and Africa ABS PC in Automotive Sales Market Share by Region in 2024
- Figure 90. Middle East and Africa ABS PC in Automotive Market Size and Growth Rate (M USD)
- Figure 91. Middle East and Africa ABS PC in Automotive Market Size by Region in 2024
- Figure 92. Saudi Arabia ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 93. Saudi Arabia ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 94. UAE ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 95. UAE ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 96. Egypt ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 97. Egypt ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 98. Nigeria ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 99. Nigeria ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 100. South Africa ABS PC in Automotive Sales and Growth Rate (2020-2025) & (K MT)
- Figure 101. South Africa ABS PC in Automotive Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 102. Global ABS PC in Automotive Production Market Share by Region (2020-2025)
- Figure 103. North America ABS PC in Automotive Production (K MT) Growth Rate (2020-2025)
- Figure 104. Europe ABS PC in Automotive Production (K MT) Growth Rate (2020-2025)
- Figure 105. Japan ABS PC in Automotive Production (K MT) Growth Rate (2020-2025)
- Figure 106. China ABS PC in Automotive Production (K MT) Growth Rate (2020-2025)
- Figure 107. Global ABS PC in Automotive Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global ABS PC in Automotive Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global ABS PC in Automotive Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global ABS PC in Automotive Market Share Forecast by Type (2026-2035)

Figure 111. Global ABS PC in Automotive Sales Forecast by Application (2026-2035)

Figure 112. Global ABS PC in Automotive Market Share Forecast by Application (2026-2035)

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