

Global Polycarbonate Diol Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polycarbonate Diol market size is expected to reach \$ 259 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032).

Polycarbonate diol (PCD) is a kind of polyol chemical materials, with two ends -OH functional group molecular, and molecular weight ranges from hundreds to thousands. In 2024, global Sodium Bicarbonate production reached approximately 32.46 K MT, with an average global market price of around US\$ 6016 per MT.

Polycarbonate diol (PCD) is a specialty polyol characterized by excellent hydrolytic stability, weather resistance, flexibility, and mechanical strength. It is typically synthesized through the polycondensation of carbonate esters with aliphatic or aromatic diols. PCD is mainly used in the production of high-performance polyurethane resins, coatings, adhesives, elastomers, and synthetic leathers, where it imparts superior durability, resistance to heat and UV light, and improved flexibility compared with conventional polyester or polyether polyols. The global production capacity is about 45,000 tons, with a gross profit margin of 12%–23%. The common single-line production capacity is around 2,000 tons.

The industry chain begins upstream with raw materials such as dimethyl carbonate (DMC), diphenyl carbonate, and various diols (like hexanediol or butanediol), which undergo controlled polymerization to yield polycarbonate diols of varying molecular weights. In the midstream, manufacturers produce PCD in different grades tailored to polyurethane formulations. Downstream, PCD is consumed by industries producing high-performance coatings, specialty adhesives, thermoplastic polyurethanes, and synthetic leather for automotive interiors, electronics, and premium footwear. As a niche product, the market is relatively consolidated, with limited global producers holding advanced

process know-how.

Market drivers include rising demand for high-durability polyurethane materials in automotive, construction, and electronics applications. The trend toward lightweight and long-lasting materials in automotive coatings and interiors is particularly supportive of PCD demand. Growth in consumer electronics and wearable devices also fuels adoption, as PCD-based polyurethanes provide flexibility and scratch resistance. Furthermore, the push toward eco-friendly and solvent-free coatings creates opportunities for PCD due to its compatibility with waterborne and high-solid formulations.

Challenges facing the market include high production costs, as the raw materials and polymerization processes are more expensive than those for conventional polyols. Limited global capacity and concentration of supply among a few producers can lead to price fluctuations and supply risks. Additionally, the presence of lower-cost substitutes such as polyester and polyether polyols restricts PCD adoption to premium applications where performance justifies the price difference. Regulatory and environmental pressures on chemical feedstocks also add complexity to upstream supply. Despite these hurdles, the market outlook remains positive as industries increasingly prioritize performance, longevity, and sustainability in polyurethane-based products.

This report studies the global Polycarbonate Diol production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polycarbonate Diol and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Polycarbonate Diol that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polycarbonate Diol total production and demand, 2021-2032, (MT)

Global Polycarbonate Diol total production value, 2021-2032, (USD Million)

Global Polycarbonate Diol production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)

Global Polycarbonate Diol consumption by region & country, CAGR, 2021-2032 & (MT)

U.S. VS China: Polycarbonate Diol domestic production, consumption, key domestic manufacturers and share

Global Polycarbonate Diol production by manufacturer, production, price, value and

market share 2021-2026, (USD Million) & (MT)

Global Polycarbonate Diol production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MT)

Global Polycarbonate Diol production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Polycarbonate Diol market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include UBE Chemical, Tosoh, Covestro, Asahi Kasei, Perstorp, Caffaro Industrie, Cromogenia-Units, Kuraray, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Polycarbonate Diol market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (USD/MT) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Polycarbonate Diol Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polycarbonate Diol Market, Segmentation by Type:

Solid PCD

Liquid PCD

Global Polycarbonate Diol Market, Segmentation by Application:

Polyurethane Elastomers

Polyurethane Adhesives

Polyurethane Coating

Others

Companies Profiled:

UBE Chemical

Tosoh

Covestro

Asahi Kasei

Perstorp

Caffaro Industrie

Cromogenia-Units

Kuraray

Key Questions Answered:

1. How big is the global Polycarbonate Diol market?
2. What is the demand of the global Polycarbonate Diol market?
3. What is the year over year growth of the global Polycarbonate Diol market?
4. What is the production and production value of the global Polycarbonate Diol market?
5. Who are the key producers in the global Polycarbonate Diol market?
6. What are the growth factors driving the market demand?

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