

North America Polyurethane (PU) Market Analysis By Product (Rigid Foam, Flexible Foam, Coatings, Adhesives & Sealants, Elastomers), By End-Use (Furniture and Interiors, Construction, Electronics & Appliances, Automotive, Footwear, Packaging) And Segment Forecasts To 2020

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Abstracts

The North American PU market is expected to reach USD 14.46 billion by 2020. Growing importance for energy efficiency on account of rising energy costs and greenhouse emissions coupled with growing demand for lightweight, high performance materials from automotive industry in order to improve fuel efficiency are expected to remain key drivers for the regional PU market. Volatile raw material prices on account of tight supply of particularly TDI are expected to remain a key challenge for market participants. Rapid development of bio-based PU expected to provide growth opportunities to key companies operating in the regional market.

Rigid foam was the largest product segment in the regional market and accounted for 33.6% of total market volume in 2013. Rigid foams are widely used in construction industry and for insulation purposes across various industries. Rising concerns energy prices have increased the importance for energy conservation. Rigid foams are used as insulation material to reduce thermal energy losses and increase energy efficiency of buildings. Rigid foam is also expected to be the fastest growing product segment at an estimated CAGR of 4.3% from 2014 to 2020. Growth of construction industry and government initiatives to improve energy efficiency of residential infrastructure is expected drive its demand over the forecast period.

Further key findings from the study suggest:

North America PU demand was 3,339.7 kilo tons in 2013 and is expected to reach 4,415.9 kilo tons by 2020, growing at a CAGR of 4.1% from 2014 to 2020.

Construction emerged as the leading end-use industry for PU in the region. The segment accounted for 33.7% of total market volume in 2013. Increasing construction spending in Mexico owing in order to meet infrastructure needs for residential and industrial purposes is expected to fuel PU demand in construction industry. Growth of construction industry in the U.S. post economic recession on account of positive outlook on GDP growth and low interest rates is expected to further drive PU demand in construction applications.

Electronics & appliance is expected to be the fastest growing end-use industry at an estimated CAGR of 5.4% from 2014 to 2020. Increasing demand for PU in electronic packaging and encapsulation applications particularly in Mexico is expected to drive PU demand in this industry. Increasing electronics consumption in Mexico on account of rising income levels is expected to further drive its growth over the next six years.

U.S. emerged as the leading nation consuming PU in the region and accounted for 82.9% of total market volume in 2013. Increasing construction spending in order to improve existing infrastructure coupled with low interest levels have fueled the housing market in the region. This trend coupled with growing importance for energy efficiency is expected to have a positive impact on the construction industry which in turn is expected to drive PU demand for insulation applications. Mexico is expected to witness the highest growth rate over the forecast period. The nation is expected to grow at an estimated CAGR of 5.7% from 2014 to 2020.

North America PU market is highly concentrated with top four companies accounting for more than 70% of the market in 2013. Some major companies operating in the market include Foamex Innovations, Huntsman Corp., BASF, Bayer Material Science, Woodbridge Foam Corp. and Dow Chemical Co.

For the purpose of this study, Grand View Research has segmented the polyurethane market on the basis of product, end-use and region:

North America Polyurethane (PU) Market Product Outlook (Volume, Kilo Tons;
Revenue, USD Million, 2012 - 2020)

Rigid Foam

Flexible Foam

Coatings

Adhesives & Sealants

Elastomers

Others

North America Polyurethane (PU) End-Use Outlook (Volume, Kilo Tons; Revenue, USD Million, 2012 - 2020)

Furniture & Interiors

Construction

Electronics & Appliances

Automotive

Footwear

Packaging

Others

North America Polyurethane (PU) Regional Outlook (Volume, Kilo Tons; Revenue, USD Million, 2012 - 2020)

U.S.

Canada

Mexico

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