

Polyols Market Size, Share & Trends Analysis Report By Product (Polyether, Polyester), By Application (Flexible Foam, Rigid Foam, Coatings, Adhesives & Sealants), And Segment Forecasts, 2018 - 2025

<https://marketpublishers.com/r/P2DCE8CE883EN.html>

Date: December 2018

Pages: 124

Price: US\$ 5,950.00 (Single User License)

ID: P2DCE8CE883EN

Abstracts

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The global polyol market size is expected to reach USD 45.17 billion by 2025 at an 8.5% CAGR during the forecast period, according to a new report by Grand View Research, Inc. There has been a shift in trend from conventional heavy materials such as metals to lightweight, high performance plastics. This has, in turn, driven the use of polyurethane to lower automotive component weight and boost fuel savings. This is likely to have a positive impact on demand for polyols across the globe.

Polyols are witnessing an increase in demand owing to their growing application scope in important end-use industries such as automotive, furniture and bedding, building and construction, pharmaceutical, and packaging. Growth of the automotive market and rising focus on energy-efficient buildings have emerged as major factors driving the polyol market.

In PU adhesive formulation, polyether polyols are the dominant product segment. Polyether polyols offer excellent flexibility at low temperatures and are relatively less sensitive to hydrolysis compared to polyester polyols. Polyether polyols is also utilized to formulate reactive hot melt adhesives. Polyester polyols are widely used in highly automated and hot melt adhesive applications that require fast set time or initial green strengths.

Furthermore, concerning the overall polyol market scenario, principal manufacturers are

seen incorporating bio-based polyols to reduce dependence on conventional petrochemical derived polyols and reduce risks, such as environmental concerns and volatile raw material prices, associated with it.

The global polyols market is concentrated and oligopolistic in nature, with top manufacturers accounting for over 48.0% of the global market. Pricing and various other strategic initiatives depend on these top market players.

Further key findings from the report suggest:

The global polyol market was valued at USD 23.60 billion in 2017 and is projected to ascend at a CAGR of 8.5% over the forecast period

Development of new products such as bio-based and CO₂-based polyols is creating significant growth potential in the global market

Key companies in this market are backward integrated owing to fluctuations in supply of raw materials. Major polyol producers have in-house raw material production facilities, which provide them with greater control in terms of pricing decisions

Focus on Green Building Code and German Renewable Energy Act (EEG), coupled with growing awareness regarding energy conservation, is expected to drive demand for polyols in the building and construction industry

Key market players include Covestro, BASF SE, The Dow Chemical Company, Shell, and Huntsman.

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