

Ethylene Glycol Market Report by Product (Monoethylene Glycol (MEG), Diethylene Glycol (DEG), Triethylene Glycol (TEG)), Manufacturing Process (Ethylene Oxide, Coal, Biological Route, and Others), Application (Polyester Fiber, PET, Antifreeze and Coolant, Film, and Others), End-Use Industry (Oil and Gas Industry, Plastic Industry, Transportation Industry, Medical Industry, Textile Industry, and Others), and Region 2024-2032

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Abstracts

The global ethylene glycol market size reached US\$ 46.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 66.3 Billion by 2032, exhibiting a growth rate (CAGR) of 3.9% during 2024-2032. The market is growing rapidly driven by the increasing product utilization in polyester and PET production, rapid expansion of the automotive industry, widespread product utilization in various industrial applications, significant technological advancements, and rising demand for non-ionic surfactants.

Ethylene Glycol Market Analysis:

Market Growth and Size: The market is witnessing stable growth, driven by the increasing product adoption in various industries and rising product demand in emerging economies, leading to an expansion in production capacities across the globe.

Major Market Drivers: Key drivers influencing the market growth include the increasing demand for polyester fibers, expanding automotive industry, significant technological advancements, and rising product utilization in non-ionic surfactants.

Technological Advancements: Recent innovations in production processes, leading to

more efficient and cost-effective methods. Additionally, the development of bio-based ethylene glycol is supporting the market growth.

Industry Applications: The market is experiencing high product demand in polyester productions, automotive coolants, oil and gas, medical applications, and as a raw material in the plastic industry.

Key Market Trends: The key market trends involve an ongoing shift towards sustainable and eco-friendly products, influencing the demand for bio-based ethylene glycol.

Additionally, rapid industrialization and expansion in the textile and automotive sectors are bolstering the market growth.

Geographical Trends: Asia Pacific leads the market due to its booming textile and industrial sectors. Other regions are also showing significant growth, fueled by technological advancements and stringent environmental regulations.

Competitive Landscape: The market is characterized by the involvement of key players that are focusing on capacity expansion, research and development (R&D), and sustainability initiatives. Additionally, they are engaging in strategic partnerships, mergers, and acquisitions to enhance market presence and diversify portfolios.

Challenges and Opportunities: The market faces various challenges, such as volatility in raw material prices and environmental concerns related to traditional production methods. However, the development of bio-based alternatives and the expansion into emerging markets are creating new opportunities for the market growth.

Ethylene Glycol Market Trends:

The increasing product utilization in polyester and PET resin production

The growing demand for ethylene glycol in polyester production is a primary factor driving the market growth. Polyester is a synthetic fiber derived from ethylene glycol and terephthalic acid. It is extensively used in the textile industry due to its durability, wrinkle resistance, and affordability. Furthermore, the widespread product utilization in the synthesis of polyethylene terephthalate (PET) resins, and films that are employed in the food and beverage (F&B) industry as a packaging material is bolstering the market growth. Additionally, the rising consumption of packaged goods, driven by increasing urbanization and changing consumer lifestyles, leading to a surge in the demand for PET, is strengthening the market growth.

Rapid expansion of the automotive industry

Ethylene glycol is widely utilized in the automotive industry as an antifreeze and coolant, which is contributing to the market growth. The automotive industry relies heavily on ethylene glycol for manufacturing radiator coolants due to its properties, such as high

boiling point and low freezing point, which ensure optimal engine performance in varying temperatures. Furthermore, the growing automotive sector, particularly in emerging economies, which directly increases the demand for ethylene glycol, is supporting the market growth. Additionally, the rising electric vehicle (EV) production, where ethylene glycol is used in cooling systems for batteries and other electronic components, is positively influencing the market growth. Moreover, the widespread adoption of EVs, owing to the increasing shifts towards sustainable and eco-friendly transportation, is driving the market growth.

Widespread product utilization in various industrial applications

Ethylene glycol finds diverse applications in various industries, contributing significantly to the market growth. It is used as a raw material in the production of antifreeze formulations and hydraulic fluids and as a medium for heat transfer in cooling systems. Furthermore, its application as a solvent in the paint and plastic industries is boosting the market growth. Additionally, the widespread utilization of ethylene glycol in the leather industry for tanning processes and in the electronics industry for manufacturing capacitors, owing to its chemical properties, such as low volatility and hygroscopic nature, is bolstering the market growth. Besides this, the ongoing innovation and technological advancements in these sectors, creating new applications for ethylene glycol, are fueling the market growth.

Rapid technological advancements

Technological advancements in the application and production of ethylene glycol are playing a pivotal role in the market growth. In line with this, innovations in production processes, leading to more efficient, cost-effective, and environmentally friendly methods of ethylene glycol synthesis, are boosting the market growth. Furthermore, recent developments in catalysis and process optimization that can increase yield and reduce energy consumption, making production more sustainable and economically viable, are positively influencing the market growth. Moreover, recent technological advancements that are enabling the production of bio-based ethylene glycol using renewable sources, such as biomass, are favoring the market growth. Apart from this, the growing environmental concerns and stringent regulatory policies aimed at reducing carbon footprints are driving the market growth.

Rising demand for non-ionic surfactants

Ethylene glycol is a component in the manufacturing of non-ionic surfactants, which are

essential in various products like detergents, emulsifiers, and wetting agents. Non-ionic surfactants, owing to their stability and non-reactive nature, are preferred in many industrial and consumer products. They are widely employed in household cleaning agents, personal care formulations, and in industrial applications, such as emulsifiers in the food industry, agrochemicals, and textile processing. Furthermore, the rising consumer spending power, urbanization, and increasing awareness about hygiene and cleanliness are strengthening the market growth. Besides this, technological advancements in surfactant chemistry, leading to the development of new and improved formulations, are positively influencing the market growth.

Ethylene Glycol Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product, manufacturing process, application, and end-use industry.

Breakup by Product:

Monoethylene Glycol (MEG)

Diethylene Glycol (DEG)

Triethylene Glycol (TEG)

Monoethylene glycol (MEG) accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the product. This includes monoethylene glycol (MEG), diethylene glycol (DEG), and triethylene glycol (TEG). According to the report, monoethylene glycol (MEG) represented the largest segment.

Breakup by Manufacturing Process:

Ethylene Oxide

Coal

Biological Route

Others

A detailed breakup and analysis of the market based on the manufacturing process have also been provided in the report. This includes ethylene oxide, coal, biological route, and others.

The ethylene oxide process involves the reaction of ethylene oxide with water under high pressure and temperature, resulting in the production of ethylene glycol. The primary advantage of this method is its high efficiency and ability to produce ethylene glycol with a high purity level, which is crucial for applications in sensitive industries like food and pharmaceuticals.

Breakup by Application:

Polyester Fiber

PET

Antifreeze and coolant

Film

Others

PET represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the application. This includes polyester fiber, PET, antifreeze and coolant, film, and others. According to the report, PET represented the largest segment.

Breakup by End-Use Industry:

Oil and Gas Industry

Plastic Industry

Transportation Industry

Medical Industry

Textile Industry

Others

A detailed breakup and analysis of the market based on the end-use industry have also been provided in the report. This includes oil and gas industry, plastic industry, transportation industry, medical industry, textile industry, and others.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan
India
South Korea
Australia
Indonesia
Others
Europe
Germany
France
United Kingdom
Italy
Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific leads the market, accounting for the largest ethylene glycol market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Akzo Nobel N.V.
Ashland Global Specialty Chemicals Inc.
BASF SE
China Petrochemical Corporation (Sinopec Group)
Dow Inc.
Formosa Plastics Corporation

Huntsman Corporation
Ineos Oxide Limited (INEOS Holdings Limited)
Lotte Chemical Corporation
Lyondellbasell Industries Inc.
Reliance Industries Limited
SABIC
Shell plc

Key Questions Answered in This Report

1. What was the size of the global ethylene glycol market in 2023?
2. What is the expected growth rate of the global ethylene glycol market during 2024-2032?
3. What are the key factors driving the global ethylene glycol market?
4. What has been the impact of COVID-19 on the global ethylene glycol market?
5. What is the breakup of the global ethylene glycol market based on the product?
6. What is the breakup of the global ethylene glycol market based on the application?
7. What are the key regions in the global ethylene glycol market?
8. Who are the key players/companies in the global ethylene glycol market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL ETHYLENE GLYCOL MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY PRODUCT

- 6.1 Monoethylene Glycol (MEG)
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Diethylene Glycol (DEG)
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Triethylene Glycol (TEG)

- 6.3.1 Market Trends
- 6.3.2 Market Forecast

7 MARKET BREAKUP BY MANUFACTURING PROCESS

- 7.1 Ethylene Oxide
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Coal
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Biological Route
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Others
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast

8 MARKET BREAKUP BY APPLICATION

- 8.1 Polyester Fiber
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 PET
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Antifreeze and Coolant
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast
- 8.4 Film
 - 8.4.1 Market Trends
 - 8.4.2 Market Forecast
- 8.5 Others
 - 8.5.1 Market Trends
 - 8.5.2 Market Forecast

9 MARKET BREAKUP BY END-USE INDUSTRY

- 9.1 Oil and Gas Industry

- 9.1.1 Market Trends
- 9.1.2 Market Forecast
- 9.2 Plastic Industry
 - 9.2.1 Market Trends
 - 9.2.2 Market Forecast
- 9.3 Transportation Industry
 - 9.3.1 Market Trends
 - 9.3.2 Market Forecast
- 9.4 Medical Industry
 - 9.4.1 Market Trends
 - 9.4.2 Market Forecast
- 9.5 Textile Industry
 - 9.5.1 Market Trends
 - 9.5.2 Market Forecast
- 9.6 Others
 - 9.6.1 Market Trends
 - 9.6.2 Market Forecast

10 MARKET BREAKUP BY REGION

- 10.1 North America
 - 10.1.1 United States
 - 10.1.1.1 Market Trends
 - 10.1.1.2 Market Forecast
 - 10.1.2 Canada
 - 10.1.2.1 Market Trends
 - 10.1.2.2 Market Forecast
- 10.2 Asia Pacific
 - 10.2.1 China
 - 10.2.1.1 Market Trends
 - 10.2.1.2 Market Forecast
 - 10.2.2 Japan
 - 10.2.2.1 Market Trends
 - 10.2.2.2 Market Forecast
 - 10.2.3 India
 - 10.2.3.1 Market Trends
 - 10.2.3.2 Market Forecast
 - 10.2.4 South Korea
 - 10.2.4.1 Market Trends

- 10.2.4.2 Market Forecast
- 10.2.5 Australia
 - 10.2.5.1 Market Trends
 - 10.2.5.2 Market Forecast
- 10.2.6 Indonesia
 - 10.2.6.1 Market Trends
 - 10.2.6.2 Market Forecast
- 10.2.7 Others
 - 10.2.7.1 Market Trends
 - 10.2.7.2 Market Forecast
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.1.1 Market Trends
 - 10.3.1.2 Market Forecast
 - 10.3.2 France
 - 10.3.2.1 Market Trends
 - 10.3.2.2 Market Forecast
 - 10.3.3 United Kingdom
 - 10.3.3.1 Market Trends
 - 10.3.3.2 Market Forecast
 - 10.3.4 Italy
 - 10.3.4.1 Market Trends
 - 10.3.4.2 Market Forecast
 - 10.3.5 Spain
 - 10.3.5.1 Market Trends
 - 10.3.5.2 Market Forecast
 - 10.3.6 Russia
 - 10.3.6.1 Market Trends
 - 10.3.6.2 Market Forecast
 - 10.3.7 Others
 - 10.3.7.1 Market Trends
 - 10.3.7.2 Market Forecast
- 10.4 Latin America
 - 10.4.1 Brazil
 - 10.4.1.1 Market Trends
 - 10.4.1.2 Market Forecast
 - 10.4.2 Mexico
 - 10.4.2.1 Market Trends
 - 10.4.2.2 Market Forecast

10.4.3 Others

10.4.3.1 Market Trends

10.4.3.2 Market Forecast

10.5 Middle East and Africa

10.5.1 Market Trends

10.5.2 Market Breakup by Country

10.5.3 Market Forecast

11 SWOT ANALYSIS

11.1 Overview

11.2 Strengths

11.3 Weaknesses

11.4 Opportunities

11.5 Threats

12 VALUE CHAIN ANALYSIS

13 PORTERS FIVE FORCES ANALYSIS

13.1 Overview

13.2 Bargaining Power of Buyers

13.3 Bargaining Power of Suppliers

13.4 Degree of Competition

13.5 Threat of New Entrants

13.6 Threat of Substitutes

14 PRICE INDICATORS

15 COMPETITIVE LANDSCAPE

15.1 Market Structure

15.2 Key Players

15.3 Profiles of Key Players

15.3.1 Akzo Nobel N.V.

15.3.1.1 Company Overview

15.3.1.2 Product Portfolio

15.3.2 Ashland Global Specialty Chemicals Inc.

15.3.2.1 Company Overview

- 15.3.2.2 Product Portfolio
- 15.3.2.3 Financials
- 15.3.2.4 SWOT Analysis
- 15.3.3 China Petrochemical Corporation (Sinopec Group)
 - 15.3.3.1 Company Overview
 - 15.3.3.2 Product Portfolio
- 15.3.4 BASF SE
 - 15.3.4.1 Company Overview
 - 15.3.4.2 Product Portfolio
 - 15.3.4.3 Financials
 - 15.3.4.4 SWOT Analysis
- 15.3.5 Dow Inc.
 - 15.3.5.1 Company Overview
 - 15.3.5.2 Product Portfolio
 - 15.3.5.3 Financials
- 15.3.6 Formosa Plastics Corporation
 - 15.3.6.1 Company Overview
 - 15.3.6.2 Product Portfolio
 - 15.3.6.3 Financials
 - 15.3.6.4 SWOT Analysis
- 15.3.7 Huntsman Corporation
 - 15.3.7.1 Company Overview
 - 15.3.7.2 Product Portfolio
 - 15.3.7.3 Financials
 - 15.3.7.4 SWOT Analysis
- 15.3.8 Ineos Oxide Limited (INEOS Holdings Limited)
 - 15.3.8.1 Company Overview
 - 15.3.8.2 Product Portfolio
 - 15.3.8.3 Financials
- 15.3.9 Lotte Chemical Corporation
 - 15.3.9.1 Company Overview
 - 15.3.9.2 Product Portfolio
 - 15.3.9.3 Financials
 - 15.3.9.4 SWOT Analysis
- 15.3.10 Lyondellbasell Industries Inc.
 - 15.3.10.1 Company Overview
 - 15.3.10.2 Product Portfolio
- 15.3.11 Reliance Industries Limited
 - 15.3.11.1 Company Overview

- 15.3.11.2 Product Portfolio
- 15.3.11.3 Financials
- 15.3.11.4 SWOT Analysis
- 15.3.12 Shell plc
 - 15.3.12.1 Company Overview
 - 15.3.12.2 Product Portfolio
 - 15.3.12.3 SWOT Analysis
- 15.3.13 SABIC
 - 15.3.13.1 Company Overview
 - 15.3.13.2 Product Portfolio
 - 15.3.13.3 Financials
 - 15.3.13.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Ethylene Glycol Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Ethylene Glycol Market Forecast: Breakup by Product (in Million Tons), 2024-2032

Table 3: Global: Ethylene Glycol Market Forecast: Breakup by Manufacturing Process (in Million Tons), 2024-2032

Table 4: Global: Ethylene Glycol Market Forecast: Breakup by Application (in Million Tons), 2024-2032

Table 5: Global: Ethylene Glycol Market Forecast: Breakup by End-Use Industry (in Million Tons), 2024-2032

Table 6: Global: Ethylene Glycol Market Forecast: Breakup by Region (in Million Tons), 2024-2032

Table 7: Global: Ethylene Glycol Market: Competitive Structure

Table 8: Global: Ethylene Glycol Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Ethylene Glycol Market: Major Drivers and Challenges

Figure 2: Global: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018-2023

Figure 3: Global: Ethylene Glycol Market: Value Trends (in Billion US\$), 2018-2023

Figure 4: Global: Ethylene Glycol Market: Breakup by Product (in %), 2023

Figure 5: Global: Ethylene Glycol Market: Breakup by Manufacturing Process (in %), 2023

Figure 6: Global: Ethylene Glycol Market: Breakup by Application (in %), 2023

Figure 7: Global: Ethylene Glycol Market: Breakup by End-Use Industry (in %), 2023

Figure 8: Global: Ethylene Glycol Market: Breakup by Region (in %), 2023

Figure 9: Global: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 10: Global: Ethylene Glycol Market Forecast: Value Trends (in Billion US\$), 2024-2032

Figure 11: Global: Ethylene Glycol (Monoethylene Glycol) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 12: Global: Ethylene Glycol (Monoethylene Glycol) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 13: Global: Ethylene Glycol (Diethylene Glycol) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 14: Global: Ethylene Glycol (Diethylene Glycol) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 15: Global: Ethylene Glycol (Triethylene Glycol) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 16: Global: Ethylene Glycol (Triethylene Glycol) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 17: Global: Ethylene Glycol (Ethylene Oxide) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 18: Global: Ethylene Glycol (Ethylene Oxide) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 19: Global: Ethylene Glycol (Coal) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 20: Global: Ethylene Glycol (Coal) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 21: Global: Ethylene Glycol (Biological Route) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 22: Global: Ethylene Glycol (Biological Route) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 23: Global: Ethylene Glycol (Other Manufacturing Processes) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 24: Global: Ethylene Glycol (Other Manufacturing Processes) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 25: Global: Ethylene Glycol (Polyester Fiber) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 26: Global: Ethylene Glycol (Polyester Fiber) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 27: Global: Ethylene Glycol (PET) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 28: Global: Ethylene Glycol (PET) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 29: Global: Ethylene Glycol (Antifreeze and Coolant) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 30: Global: Ethylene Glycol (Antifreeze and Coolant) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 31: Global: Ethylene Glycol (Film) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 32: Global: Ethylene Glycol (Film) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 33: Global: Ethylene Glycol (Other Applications) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 34: Global: Ethylene Glycol (Other Applications) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 35: Global: Ethylene Glycol (Oil and Gas Industry) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 36: Global: Ethylene Glycol (Oil and Gas Industry) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 37: Global: Ethylene Glycol (Plastic Industry) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 38: Global: Ethylene Glycol (Plastic Industry) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 39: Global: Ethylene Glycol (Transportation Industry) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 40: Global: Ethylene Glycol (Transportation Industry) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 41: Global: Ethylene Glycol (Medical Industry) Market: Volume Trends (in Million

Tons), 2018 & 2023

Figure 42: Global: Ethylene Glycol (Medical Industry) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 43: Global: Ethylene Glycol (Textile Industry) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 44: Global: Ethylene Glycol (Textile Industry) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 45: Global: Ethylene Glycol (Other End-Use Industries) Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 46: Global: Ethylene Glycol (Other End-Use Industries) Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 47: North America: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 48: North America: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 49: United States: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 50: United States: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 51: Canada: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 52: Canada: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 53: Asia Pacific: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 54: Asia Pacific: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 55: China: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 56: China: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 57: Japan: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 58: Japan: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 59: India: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 60: India: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 61: South Korea: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018

& 2023

Figure 62: South Korea: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 63: Australia: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 64: Australia: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 65: Indonesia: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 66: Indonesia: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 67: Others: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 68: Others: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 69: Europe: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 70: Europe: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 71: Germany: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 72: Germany: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 73: France: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 74: France: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 75: United Kingdom: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 76: United Kingdom: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 77: Italy: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 78: Italy: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 79: Spain: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 80: Spain: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 81: Russia: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 &

2023

Figure 82: Russia: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 83: Others: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 84: Others: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 85: Latin America: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 86: Latin America: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 87: Brazil: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 88: Brazil: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 89: Mexico: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 90: Mexico: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 91: Others: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 92: Others: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 93: Middle East and Africa: Ethylene Glycol Market: Volume Trends (in Million Tons), 2018 & 2023

Figure 94: Middle East and Africa: Ethylene Glycol Market: Breakup by Country (in %), 2023

Figure 95: Middle East and Africa: Ethylene Glycol Market Forecast: Volume Trends (in Million Tons), 2024-2032

Figure 96: Global: Ethylene Glycol Industry: SWOT Analysis

Figure 97: Global: Ethylene Glycol Industry: Value Chain Analysis

Figure 98: Global: Ethylene Glycol Industry: Porter's Five Forces Analysis

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