

# Global Polyester Polyols Market Growth 2026-2032

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## Abstracts

The global Polyester Polyols market size is predicted to grow from US\$ 4798 million in 2025 to US\$ 6352 million in 2032; it is expected to grow at a CAGR of 4.3% from 2026 to 2032.

In 2025, global Polyester polyols sales reached approximately 2,923.08 K MT, with an average global market price of around US\$ 1,678 per MT.

Polyester polyols are a type of polyol, which are key building blocks in the production of polyurethane. They are formed by the reaction between dibasic acids (such as adipic or phthalic acid) and polyhydric alcohols (like ethylene glycol or glycerol). These polyols are used primarily in the creation of polyurethane foams, coatings, elastomers, and adhesives, contributing to the flexibility, durability, and resilience of these materials.

Polyester polyols offer good mechanical strength, abrasion resistance, and chemical stability, making them suitable for high-performance applications such as automotive parts, furniture foam, insulation materials, and footwear. They are also utilized in various coatings and adhesives for industrial use, owing to their resistance to chemicals and environmental factors. The specific properties of the polyester polyol can be customized based on the acids and alcohols used in its formulation, making it versatile for a wide range of applications.

Polyester polyols are typically produced via a chemical manufacturing route of ?monomer sourcing ? esterification/transesterification ? vacuum polycondensation ? finishing/filtration ? storage & delivery.? Commodity grades are often made in continuous or semi-continuous units, while specialty grades are commonly produced in batch reactors with formulation tailoring. Some aromatic polyester polyols are also made through recycled-PET glycolysis/transesterification, followed by repolymerization, enabling rPET-based circular feedstock pathways.

In terms of gross margin, the business combines 'feedstock-driven economics' with 'value-added formulation/service premium.' Because costs are highly exposed to PTA/phthalic anhydride/adipic acid and EG/DEG volatility, industry profitability is generally tight; disclosures from PU resin / polyester-polyol-related companies show consolidated gross margins historically around ~8-16% as a practical reference. Commodity grades typically sit in high single digits to low/mid-teens, while differentiated high-end grades (low color, hydrolysis resistance, narrow distribution) and system-house services can be higher depending on customization intensity and customer qualification stickiness.

Upstream includes diacids/anhydrides, glycols/polyols and catalysts; midstream covers polyester polyol production plus system/prepolymer blending; downstream spans PU rigid foam/PIR insulation and cold-chain panels, TPU/cast elastomers, CASE (adhesives, sealants, coatings), synthetic leather and related end uses.

### Market Development Opportunities & Main Driving Factors

Under the dual drive of global energy structure transition and industrial upgrading, the polyester polyols market is entering a phase of structural growth dividends. The escalation of building energy efficiency standards is the core engine for rigid polyurethane foam demand. This is particularly evident under the EU's recast Energy Performance of Buildings Directive (EPBD) and China's 'Dual Carbon' policies, which are accelerating the penetration of high-efficiency insulation materials. Concurrently, the circular economy has transformed from a compliance cost into a core competitive advantage. Technological breakthroughs in rPET (recycled polyester) pathways and bio-based polyols have opened high-premium 'green premium' tracks for enterprises. This trend not only satisfies the stringent carbon footprint requirements of multinational brands but also reduces long-term dependence on traditional petrochemical feedstocks through technical iteration, offering investors a growth logic with strong anti-cyclical attributes.

### Market Challenges, Risks, & Restraints

Despite the promising outlook, the industry must remain vigilant against the challenges of highly volatile raw material costs and supply chain resilience risks brought by an increasingly complex international geopolitical environment. Annual reports from Huntsman and other key players highlight that price fluctuations in upstream bulk commodities like adipic acid and propylene oxide, coupled with uncertainties in maritime

logistics, continue to squeeze the gross margins of midstream manufacturers. Furthermore, regulatory thresholds for carbon footprint accounting and environmental compliance (such as VOC emission limits) in major global trading zones like North America and Europe have risen significantly, placing immense pressure on enterprises to retrofit existing capacities. In the Asia-Pacific market, as intensified competition stems from regional capacity expansion, the core challenge for leadership lies in breaking the deadlock of homogenization through differentiated R&D while effectively hedging against export risks posed by regional tariff barriers.

### Downstream Demand Trends

Downstream applications are undergoing a profound transformation from 'scale-driven expansion' to 'functional customization.' In the automotive industry, the surge in Electric Vehicles (EVs) has driven rigid demand for lightweight, high-flame-retardant, and acoustically comfortable materials, solidifying the position of polyester polyols in battery pack insulation and high-performance interior systems. Brokerage analyses indicate an accelerated evolution toward waterborne and solvent-free formulations in the CASE (Coatings, Adhesives, Sealants, and Elastomers) sectors. Particularly in electronic packaging and high-end footwear, there are higher-dimensional requirements for the hydrolysis resistance and bonding strength of polyester polyols. As consumer electronics move toward flexibility and cold-chain logistics infrastructure expands globally, the demand growth for specialty polyester polyols with specific functionalities and narrow molecular weight distributions is expected to significantly outpace that of general-purpose products.

LP Information, Inc. (LPI) ' newest research report, the 'Polyester Polyols Industry Forecast' looks at past sales and reviews total world Polyester Polyols sales in 2025, providing a comprehensive analysis by region and market sector of projected Polyester Polyols sales for 2026 through 2032. With Polyester Polyols sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Polyester Polyols industry.

This Insight Report provides a comprehensive analysis of the global Polyester Polyols landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Polyester Polyols portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Polyester Polyols market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Polyester Polyols and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Polyester Polyols.

This report presents a comprehensive overview, market shares, and growth opportunities of Polyester Polyols market by product type, application, key manufacturers and key regions and countries.

#### Segmentation by Type:

Aliphatic Polyester Polyols

Aromatic Polyester Polyols

Others

#### Segmentation by Raw Material Source:

Petrochemical-based

Bio-based

Others

#### Segmentation by Molecular Weight:

Low MW

High MW

#### Segmentation by Physical Form:

Liquid Type

Solid/Semi-Solid

Segmentation by Application:

Foam

Elastomers

Adhesives and Sealants

Coatings

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Huafeng

Stepan

COIM

Xuchuan Chemical

BASF

Huntsman

Huada Chem

Huide Science & Technology

BCI Holding

Miracll Chemicals

Synthesia Technology

Covestro

Purinova

Shanghai Rising Chemical

Emery Oleochemicals

Ingevity

Arkema

PCC Rokita SA

Evonik

DIC

INOV

Polexchem

Kimpur

Skori New Material

Flokser Kimya

Kuraray

Woojo Hightech

Kobe Polyurethane

NEO GROUP

SBHPP (Sumitomo Bakelite)

Sehotech

## **Key Questions Addressed in this Report**

What is the 10-year outlook for the global Polyester Polyols market?

What factors are driving Polyester Polyols market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Polyester Polyols market opportunities vary by end market size?

How does Polyester Polyols break out by Type, by Application?

## Contents

### 1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

### 2 EXECUTIVE SUMMARY

#### 2.1 World Market Overview

- 2.1.1 Global Polyester Polyols Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Polyester Polyols by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Polyester Polyols by Country/Region, 2021, 2025 & 2032

#### 2.2 Polyester Polyols Segment by Type

- 2.2.1 Aliphatic Polyester Polyols
- 2.2.2 Aromatic Polyester Polyols
- 2.2.3 Others
- 2.2.4 Polyester Polyols Sales by Type
  - 2.2.4.1 Global Polyester Polyols Sales Market Share by Type (2021-2026)
  - 2.2.4.2 Global Polyester Polyols Revenue and Market Share by Type (2021-2026)
  - 2.2.4.3 Global Polyester Polyols Sale Price by Type (2021-2026)

#### 2.3 Polyester Polyols Segment by Raw Material Source

- 2.3.1 Petrochemical-based
- 2.3.2 Bio-based
- 2.3.3 Others
- 2.3.4 Polyester Polyols Sales by Raw Material Source
  - 2.3.4.1 Global Polyester Polyols Sales Market Share by Raw Material Source (2021-2026)
  - 2.3.4.2 Global Polyester Polyols Revenue and Market Share by Raw Material Source (2021-2026)
  - 2.3.4.3 Global Polyester Polyols Sale Price by Raw Material Source (2021-2026)

## 2.4 Polyester Polyols Segment by Molecular Weight

### 2.4.1 Low MW

### 2.4.2 High MW

### 2.4.3 Polyester Polyols Sales by Molecular Weight

#### 2.4.3.1 Global Polyester Polyols Sales Market Share by Molecular Weight (2021-2026)

#### 2.4.3.2 Global Polyester Polyols Revenue and Market Share by Molecular Weight (2021-2026)

#### 2.4.3.3 Global Polyester Polyols Sale Price by Molecular Weight (2021-2026)

## 2.5 Polyester Polyols Segment by Physical Form

### 2.5.1 Liquid Type

### 2.5.2 Solid/Semi-Solid

### 2.5.3 Polyester Polyols Sales by Physical Form

#### 2.5.3.1 Global Polyester Polyols Sales Market Share by Physical Form (2021-2026)

#### 2.5.3.2 Global Polyester Polyols Revenue and Market Share by Physical Form (2021-2026)

#### 2.5.3.3 Global Polyester Polyols Sale Price by Physical Form (2021-2026)

## 2.6 Polyester Polyols Segment by Application

### 2.6.1 Foam

### 2.6.2 Elastomers

### 2.6.3 Adhesives and Sealants

### 2.6.4 Coatings

### 2.6.5 Others

### 2.6.6 Polyester Polyols Sales by Application

#### 2.6.6.1 Global Polyester Polyols Sale Market Share by Application (2021-2026)

#### 2.6.6.2 Global Polyester Polyols Revenue and Market Share by Application (2021-2026)

#### 2.6.6.3 Global Polyester Polyols Sale Price by Application (2021-2026)

## 3 GLOBAL BY COMPANY

### 3.1 Global Polyester Polyols Breakdown Data by Company

#### 3.1.1 Global Polyester Polyols Annual Sales by Company (2021-2026)

#### 3.1.2 Global Polyester Polyols Sales Market Share by Company (2021-2026)

### 3.2 Global Polyester Polyols Annual Revenue by Company (2021-2026)

#### 3.2.1 Global Polyester Polyols Revenue by Company (2021-2026)

#### 3.2.2 Global Polyester Polyols Revenue Market Share by Company (2021-2026)

### 3.3 Global Polyester Polyols Sale Price by Company

### 3.4 Key Manufacturers Polyester Polyols Producing Area Distribution, Sales Area,

## Product Type

- 3.4.1 Key Manufacturers Polyester Polyols Product Location Distribution
- 3.4.2 Players Polyester Polyols Products Offered
- 3.5 Market Concentration Rate Analysis
  - 3.5.1 Competition Landscape Analysis
  - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

## **4 WORLD HISTORIC REVIEW FOR POLYESTER POLYOLS BY GEOGRAPHIC REGION**

- 4.1 World Historic Polyester Polyols Market Size by Geographic Region (2021-2026)
  - 4.1.1 Global Polyester Polyols Annual Sales by Geographic Region (2021-2026)
  - 4.1.2 Global Polyester Polyols Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Polyester Polyols Market Size by Country/Region (2021-2026)
  - 4.2.1 Global Polyester Polyols Annual Sales by Country/Region (2021-2026)
  - 4.2.2 Global Polyester Polyols Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Polyester Polyols Sales Growth
- 4.4 APAC Polyester Polyols Sales Growth
- 4.5 Europe Polyester Polyols Sales Growth
- 4.6 Middle East & Africa Polyester Polyols Sales Growth

## **5 AMERICAS**

- 5.1 Americas Polyester Polyols Sales by Country
  - 5.1.1 Americas Polyester Polyols Sales by Country (2021-2026)
  - 5.1.2 Americas Polyester Polyols Revenue by Country (2021-2026)
- 5.2 Americas Polyester Polyols Sales by Type (2021-2026)
- 5.3 Americas Polyester Polyols Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

## **6 APAC**

- 6.1 APAC Polyester Polyols Sales by Region
  - 6.1.1 APAC Polyester Polyols Sales by Region (2021-2026)

- 6.1.2 APAC Polyester Polyols Revenue by Region (2021-2026)
- 6.2 APAC Polyester Polyols Sales by Type (2021-2026)
- 6.3 APAC Polyester Polyols Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

## **7 EUROPE**

- 7.1 Europe Polyester Polyols by Country
  - 7.1.1 Europe Polyester Polyols Sales by Country (2021-2026)
  - 7.1.2 Europe Polyester Polyols Revenue by Country (2021-2026)
- 7.2 Europe Polyester Polyols Sales by Type (2021-2026)
- 7.3 Europe Polyester Polyols Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

## **8 MIDDLE EAST & AFRICA**

- 8.1 Middle East & Africa Polyester Polyols by Country
  - 8.1.1 Middle East & Africa Polyester Polyols Sales by Country (2021-2026)
  - 8.1.2 Middle East & Africa Polyester Polyols Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Polyester Polyols Sales by Type (2021-2026)
- 8.3 Middle East & Africa Polyester Polyols Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

## **9 MARKET DRIVERS, CHALLENGES AND TRENDS**

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

## **10 MANUFACTURING COST STRUCTURE ANALYSIS**

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Polyester Polyols

10.3 Manufacturing Process Analysis of Polyester Polyols

10.4 Industry Chain Structure of Polyester Polyols

## **11 MARKETING, DISTRIBUTORS AND CUSTOMER**

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Polyester Polyols Distributors

11.3 Polyester Polyols Customer

## **12 WORLD FORECAST REVIEW FOR POLYESTER POLYOLS BY GEOGRAPHIC REGION**

12.1 Global Polyester Polyols Market Size Forecast by Region

12.1.1 Global Polyester Polyols Forecast by Region (2027-2032)

12.1.2 Global Polyester Polyols Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Polyester Polyols Forecast by Type (2027-2032)

12.7 Global Polyester Polyols Forecast by Application (2027-2032)

## **13 KEY PLAYERS ANALYSIS**

13.1 Huafeng

13.1.1 Huafeng Company Information

13.1.2 Huafeng Polyester Polyols Product Portfolios and Specifications

13.1.3 Huafeng Polyester Polyols Sales, Revenue, Price and Gross Margin  
(2021-2026)

- 13.1.4 Huafeng Main Business Overview
- 13.1.5 Huafeng Latest Developments
- 13.2 Stepan
  - 13.2.1 Stepan Company Information
  - 13.2.2 Stepan Polyester Polyols Product Portfolios and Specifications
  - 13.2.3 Stepan Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.2.4 Stepan Main Business Overview
  - 13.2.5 Stepan Latest Developments
- 13.3 COIM
  - 13.3.1 COIM Company Information
  - 13.3.2 COIM Polyester Polyols Product Portfolios and Specifications
  - 13.3.3 COIM Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.3.4 COIM Main Business Overview
  - 13.3.5 COIM Latest Developments
- 13.4 Xuchuan Chemical
  - 13.4.1 Xuchuan Chemical Company Information
  - 13.4.2 Xuchuan Chemical Polyester Polyols Product Portfolios and Specifications
  - 13.4.3 Xuchuan Chemical Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.4.4 Xuchuan Chemical Main Business Overview
  - 13.4.5 Xuchuan Chemical Latest Developments
- 13.5 BASF
  - 13.5.1 BASF Company Information
  - 13.5.2 BASF Polyester Polyols Product Portfolios and Specifications
  - 13.5.3 BASF Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.5.4 BASF Main Business Overview
  - 13.5.5 BASF Latest Developments
- 13.6 Huntsman
  - 13.6.1 Huntsman Company Information
  - 13.6.2 Huntsman Polyester Polyols Product Portfolios and Specifications
  - 13.6.3 Huntsman Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.6.4 Huntsman Main Business Overview
  - 13.6.5 Huntsman Latest Developments
- 13.7 Huada Chem
  - 13.7.1 Huada Chem Company Information
  - 13.7.2 Huada Chem Polyester Polyols Product Portfolios and Specifications
  - 13.7.3 Huada Chem Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.7.4 Huada Chem Main Business Overview
- 13.7.5 Huada Chem Latest Developments
- 13.8 Huide Science & Technology
  - 13.8.1 Huide Science & Technology Company Information
  - 13.8.2 Huide Science & Technology Polyester Polyols Product Portfolios and Specifications
  - 13.8.3 Huide Science & Technology Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.8.4 Huide Science & Technology Main Business Overview
  - 13.8.5 Huide Science & Technology Latest Developments
- 13.9 BCI Holding
  - 13.9.1 BCI Holding Company Information
  - 13.9.2 BCI Holding Polyester Polyols Product Portfolios and Specifications
  - 13.9.3 BCI Holding Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.9.4 BCI Holding Main Business Overview
  - 13.9.5 BCI Holding Latest Developments
- 13.10 Miracll Chemicals
  - 13.10.1 Miracll Chemicals Company Information
  - 13.10.2 Miracll Chemicals Polyester Polyols Product Portfolios and Specifications
  - 13.10.3 Miracll Chemicals Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.10.4 Miracll Chemicals Main Business Overview
  - 13.10.5 Miracll Chemicals Latest Developments
- 13.11 Synthesia Technology
  - 13.11.1 Synthesia Technology Company Information
  - 13.11.2 Synthesia Technology Polyester Polyols Product Portfolios and Specifications
  - 13.11.3 Synthesia Technology Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.11.4 Synthesia Technology Main Business Overview
  - 13.11.5 Synthesia Technology Latest Developments
- 13.12 Covestro
  - 13.12.1 Covestro Company Information
  - 13.12.2 Covestro Polyester Polyols Product Portfolios and Specifications
  - 13.12.3 Covestro Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.12.4 Covestro Main Business Overview
  - 13.12.5 Covestro Latest Developments
- 13.13 Purinova

- 13.13.1 Purinova Company Information
- 13.13.2 Purinova Polyester Polyols Product Portfolios and Specifications
- 13.13.3 Purinova Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.13.4 Purinova Main Business Overview
- 13.13.5 Purinova Latest Developments
- 13.14 Shanghai Rising Chemical
  - 13.14.1 Shanghai Rising Chemical Company Information
  - 13.14.2 Shanghai Rising Chemical Polyester Polyols Product Portfolios and Specifications
  - 13.14.3 Shanghai Rising Chemical Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.14.4 Shanghai Rising Chemical Main Business Overview
  - 13.14.5 Shanghai Rising Chemical Latest Developments
- 13.15 Emery Oleochemicals
  - 13.15.1 Emery Oleochemicals Company Information
  - 13.15.2 Emery Oleochemicals Polyester Polyols Product Portfolios and Specifications
  - 13.15.3 Emery Oleochemicals Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.15.4 Emery Oleochemicals Main Business Overview
  - 13.15.5 Emery Oleochemicals Latest Developments
- 13.16 Ingevity
  - 13.16.1 Ingevity Company Information
  - 13.16.2 Ingevity Polyester Polyols Product Portfolios and Specifications
  - 13.16.3 Ingevity Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.16.4 Ingevity Main Business Overview
  - 13.16.5 Ingevity Latest Developments
- 13.17 Arkema
  - 13.17.1 Arkema Company Information
  - 13.17.2 Arkema Polyester Polyols Product Portfolios and Specifications
  - 13.17.3 Arkema Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)
  - 13.17.4 Arkema Main Business Overview
  - 13.17.5 Arkema Latest Developments
- 13.18 PCC Rokita SA
  - 13.18.1 PCC Rokita SA Company Information
  - 13.18.2 PCC Rokita SA Polyester Polyols Product Portfolios and Specifications
  - 13.18.3 PCC Rokita SA Polyester Polyols Sales, Revenue, Price and Gross Margin

(2021-2026)

13.18.4 PCC Rokita SA Main Business Overview

13.18.5 PCC Rokita SA Latest Developments

13.19 Evonik

13.19.1 Evonik Company Information

13.19.2 Evonik Polyester Polyols Product Portfolios and Specifications

13.19.3 Evonik Polyester Polyols Sales, Revenue, Price and Gross Margin

(2021-2026)

13.19.4 Evonik Main Business Overview

13.19.5 Evonik Latest Developments

13.20 DIC

13.20.1 DIC Company Information

13.20.2 DIC Polyester Polyols Product Portfolios and Specifications

13.20.3 DIC Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 DIC Main Business Overview

13.20.5 DIC Latest Developments

13.21 INOV

13.21.1 INOV Company Information

13.21.2 INOV Polyester Polyols Product Portfolios and Specifications

13.21.3 INOV Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.21.4 INOV Main Business Overview

13.21.5 INOV Latest Developments

13.22 Pollexchem

13.22.1 Pollexchem Company Information

13.22.2 Pollexchem Polyester Polyols Product Portfolios and Specifications

13.22.3 Pollexchem Polyester Polyols Sales, Revenue, Price and Gross Margin

(2021-2026)

13.22.4 Pollexchem Main Business Overview

13.22.5 Pollexchem Latest Developments

13.23 Kimpur

13.23.1 Kimpur Company Information

13.23.2 Kimpur Polyester Polyols Product Portfolios and Specifications

13.23.3 Kimpur Polyester Polyols Sales, Revenue, Price and Gross Margin

(2021-2026)

13.23.4 Kimpur Main Business Overview

13.23.5 Kimpur Latest Developments

13.24 Skori New Material

13.24.1 Skori New Material Company Information

13.24.2 Skori New Material Polyester Polyols Product Portfolios and Specifications

13.24.3 Skori New Material Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.24.4 Skori New Material Main Business Overview

13.24.5 Skori New Material Latest Developments

13.25 Flokser Kimya

13.25.1 Flokser Kimya Company Information

13.25.2 Flokser Kimya Polyester Polyols Product Portfolios and Specifications

13.25.3 Flokser Kimya Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.25.4 Flokser Kimya Main Business Overview

13.25.5 Flokser Kimya Latest Developments

13.26 Kuraray

13.26.1 Kuraray Company Information

13.26.2 Kuraray Polyester Polyols Product Portfolios and Specifications

13.26.3 Kuraray Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.26.4 Kuraray Main Business Overview

13.26.5 Kuraray Latest Developments

13.27 Woojo Hightech

13.27.1 Woojo Hightech Company Information

13.27.2 Woojo Hightech Polyester Polyols Product Portfolios and Specifications

13.27.3 Woojo Hightech Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.27.4 Woojo Hightech Main Business Overview

13.27.5 Woojo Hightech Latest Developments

13.28 Kobe Polyurethane

13.28.1 Kobe Polyurethane Company Information

13.28.2 Kobe Polyurethane Polyester Polyols Product Portfolios and Specifications

13.28.3 Kobe Polyurethane Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.28.4 Kobe Polyurethane Main Business Overview

13.28.5 Kobe Polyurethane Latest Developments

13.29 NEO GROUP

13.29.1 NEO GROUP Company Information

13.29.2 NEO GROUP Polyester Polyols Product Portfolios and Specifications

13.29.3 NEO GROUP Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

13.29.4 NEO GROUP Main Business Overview

13.29.5 NEO GROUP Latest Developments

### 13.30 SBHPP (Sumitomo Bakelite)

#### 13.30.1 SBHPP (Sumitomo Bakelite) Company Information

#### 13.30.2 SBHPP (Sumitomo Bakelite) Polyester Polyols Product Portfolios and Specifications

#### 13.30.3 SBHPP (Sumitomo Bakelite) Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.30.4 SBHPP (Sumitomo Bakelite) Main Business Overview

#### 13.30.5 SBHPP (Sumitomo Bakelite) Latest Developments

### 13.31 Sehotech

#### 13.31.1 Sehotech Company Information

#### 13.31.2 Sehotech Polyester Polyols Product Portfolios and Specifications

#### 13.31.3 Sehotech Polyester Polyols Sales, Revenue, Price and Gross Margin (2021-2026)

#### 13.31.4 Sehotech Main Business Overview

#### 13.31.5 Sehotech Latest Developments

## 14 RESEARCH FINDINGS AND CONCLUSION

## List Of Tables

### LIST OF TABLES

- Table 1. Polyester Polyols Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Polyester Polyols Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Aliphatic Polyester Polyols
- Table 4. Major Players of Aromatic Polyester Polyols
- Table 5. Major Players of Others
- Table 6. Global Polyester Polyols Sales by Type (2021-2026) & (K MT)
- Table 7. Global Polyester Polyols Sales Market Share by Type (2021-2026)
- Table 8. Global Polyester Polyols Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global Polyester Polyols Revenue Market Share by Type (2021-2026)
- Table 10. Global Polyester Polyols Sale Price by Type (2021-2026) & (US\$/MT)
- Table 11. Major Players of Petrochemical-based
- Table 12. Major Players of Bio-based
- Table 13. Major Players of Others
- Table 14. Global Polyester Polyols Sales by Raw Material Source (2021-2026) & (K MT)
- Table 15. Global Polyester Polyols Sales Market Share by Raw Material Source (2021-2026)
- Table 16. Global Polyester Polyols Revenue by Raw Material Source (2021-2026) & (\$ million)
- Table 17. Global Polyester Polyols Revenue Market Share by Raw Material Source (2021-2026)
- Table 18. Global Polyester Polyols Sale Price by Raw Material Source (2021-2026) & (US\$/MT)
- Table 19. Major Players of Low MW
- Table 20. Major Players of High MW
- Table 21. Global Polyester Polyols Sales by Molecular Weight (2021-2026) & (K MT)
- Table 22. Global Polyester Polyols Sales Market Share by Molecular Weight (2021-2026)
- Table 23. Global Polyester Polyols Revenue by Molecular Weight (2021-2026) & (\$ million)
- Table 24. Global Polyester Polyols Revenue Market Share by Molecular Weight (2021-2026)
- Table 25. Global Polyester Polyols Sale Price by Molecular Weight (2021-2026) & (US\$/MT)

Table 26. Major Players of Liquid Type

Table 27. Major Players of Solid/Semi-Solid

Table 28. Global Polyester Polyols Sales by Physical Form (2021-2026) & (K MT)

Table 29. Global Polyester Polyols Sales Market Share by Physical Form (2021-2026)

Table 30. Global Polyester Polyols Revenue by Physical Form (2021-2026) & (\$ million)

Table 31. Global Polyester Polyols Revenue Market Share by Physical Form  
(2021-2026)

Table 32. Global Polyester Polyols Sale Price by Physical Form (2021-2026) &  
(US\$/MT)

Table 33. Global Polyester Polyols Sale by Application (2021-2026) & (K MT)

Table 34. Global Polyester Polyols Sale Market Share by Application (2021-2026)

Table 35. Global Polyester Polyols Revenue by Application (2021-2026) & (\$ million)

Table 36. Global Polyester Polyols Revenue Market Share by Application (2021-2026)

Table 37. Global Polyester Polyols Sale Price by Application (2021-2026) & (US\$/MT)

Table 38. Global Polyester Polyols Sales by Company (2021-2026) & (K MT)

Table 39. Global Polyester Polyols Sales Market Share by Company (2021-2026)

Table 40. Global Polyester Polyols Revenue by Company (2021-2026) & (\$ millions)

Table 41. Global Polyester Polyols Revenue Market Share by Company (2021-2026)

Table 42. Global Polyester Polyols Sale Price by Company (2021-2026) & (US\$/MT)

Table 43. Key Manufacturers Polyester Polyols Producing Area Distribution and Sales  
Area

Table 44. Players Polyester Polyols Products Offered

Table 45. Polyester Polyols Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 46. New Products and Potential Entrants

Table 47. Market M&A Activity & Strategy

Table 48. Global Polyester Polyols Sales by Geographic Region (2021-2026) & (K MT)

Table 49. Global Polyester Polyols Sales Market Share Geographic Region (2021-2026)

Table 50. Global Polyester Polyols Revenue by Geographic Region (2021-2026) & (\$  
millions)

Table 51. Global Polyester Polyols Revenue Market Share by Geographic Region  
(2021-2026)

Table 52. Global Polyester Polyols Sales by Country/Region (2021-2026) & (K MT)

Table 53. Global Polyester Polyols Sales Market Share by Country/Region (2021-2026)

Table 54. Global Polyester Polyols Revenue by Country/Region (2021-2026) & (\$  
millions)

Table 55. Global Polyester Polyols Revenue Market Share by Country/Region  
(2021-2026)

Table 56. Americas Polyester Polyols Sales by Country (2021-2026) & (K MT)

Table 57. Americas Polyester Polyols Sales Market Share by Country (2021-2026)

|                                                                                                     |
|-----------------------------------------------------------------------------------------------------|
| Table 58. Americas Polyester Polyols Revenue by Country (2021-2026) & (\$ millions)                 |
| Table 59. Americas Polyester Polyols Sales by Type (2021-2026) & (K MT)                             |
| Table 60. Americas Polyester Polyols Sales by Application (2021-2026) & (K MT)                      |
| Table 61. APAC Polyester Polyols Sales by Region (2021-2026) & (K MT)                               |
| Table 62. APAC Polyester Polyols Sales Market Share by Region (2021-2026)                           |
| Table 63. APAC Polyester Polyols Revenue by Region (2021-2026) & (\$ millions)                      |
| Table 64. APAC Polyester Polyols Sales by Type (2021-2026) & (K MT)                                 |
| Table 65. APAC Polyester Polyols Sales by Application (2021-2026) & (K MT)                          |
| Table 66. Europe Polyester Polyols Sales by Country (2021-2026) & (K MT)                            |
| Table 67. Europe Polyester Polyols Revenue by Country (2021-2026) & (\$ millions)                   |
| Table 68. Europe Polyester Polyols Sales by Type (2021-2026) & (K MT)                               |
| Table 69. Europe Polyester Polyols Sales by Application (2021-2026) & (K MT)                        |
| Table 70. Middle East & Africa Polyester Polyols Sales by Country (2021-2026) & (K MT)              |
| Table 71. Middle East & Africa Polyester Polyols Revenue Market Share by Country (2021-2026)        |
| Table 72. Middle East & Africa Polyester Polyols Sales by Type (2021-2026) & (K MT)                 |
| Table 73. Middle East & Africa Polyester Polyols Sales by Application (2021-2026) & (K MT)          |
| Table 74. Key Market Drivers & Growth Opportunities of Polyester Polyols                            |
| Table 75. Key Market Challenges & Risks of Polyester Polyols                                        |
| Table 76. Key Industry Trends of Polyester Polyols                                                  |
| Table 77. Polyester Polyols Raw Material                                                            |
| Table 78. Key Suppliers of Raw Materials                                                            |
| Table 79. Polyester Polyols Distributors List                                                       |
| Table 80. Polyester Polyols Customer List                                                           |
| Table 81. Global Polyester Polyols Sales Forecast by Region (2027-2032) & (K MT)                    |
| Table 82. Global Polyester Polyols Revenue Forecast by Region (2027-2032) & (\$ millions)           |
| Table 83. Americas Polyester Polyols Sales Forecast by Country (2027-2032) & (K MT)                 |
| Table 84. Americas Polyester Polyols Annual Revenue Forecast by Country (2027-2032) & (\$ millions) |
| Table 85. APAC Polyester Polyols Sales Forecast by Region (2027-2032) & (K MT)                      |
| Table 86. APAC Polyester Polyols Annual Revenue Forecast by Region (2027-2032) & (\$ millions)      |
| Table 87. Europe Polyester Polyols Sales Forecast by Country (2027-2032) & (K MT)                   |
| Table 88. Europe Polyester Polyols Revenue Forecast by Country (2027-2032) & (\$ millions)          |
| Table 89. Middle East & Africa Polyester Polyols Sales Forecast by Country                          |

(2027-2032) & (K MT)

Table 90. Middle East & Africa Polyester Polyols Revenue Forecast by Country  
(2027-2032) & (\$ millions)

Table 91. Global Polyester Polyols Sales Forecast by Type (2027-2032) & (K MT)

Table 92. Global Polyester Polyols Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 93. Global Polyester Polyols Sales Forecast by Application (2027-2032) & (K MT)

Table 94. Global Polyester Polyols Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 95. Huafeng Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 96. Huafeng Polyester Polyols Product Portfolios and Specifications

Table 97. Huafeng Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 98. Huafeng Main Business

Table 99. Huafeng Latest Developments

Table 100. Stepan Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 101. Stepan Polyester Polyols Product Portfolios and Specifications

Table 102. Stepan Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 103. Stepan Main Business

Table 104. Stepan Latest Developments

Table 105. COIM Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 106. COIM Polyester Polyols Product Portfolios and Specifications

Table 107. COIM Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 108. COIM Main Business

Table 109. COIM Latest Developments

Table 110. Xuchuan Chemical Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 111. Xuchuan Chemical Polyester Polyols Product Portfolios and Specifications

Table 112. Xuchuan Chemical Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 113. Xuchuan Chemical Main Business

Table 114. Xuchuan Chemical Latest Developments

Table 115. BASF Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

|                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------|
| Table 116. BASF Polyester Polyols Product Portfolios and Specifications                                                                  |
| Table 117. BASF Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)                       |
| Table 118. BASF Main Business                                                                                                            |
| Table 119. BASF Latest Developments                                                                                                      |
| Table 120. Huntsman Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                              |
| Table 121. Huntsman Polyester Polyols Product Portfolios and Specifications                                                              |
| Table 122. Huntsman Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)                   |
| Table 123. Huntsman Main Business                                                                                                        |
| Table 124. Huntsman Latest Developments                                                                                                  |
| Table 125. Huada Chem Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                            |
| Table 126. Huada Chem Polyester Polyols Product Portfolios and Specifications                                                            |
| Table 127. Huada Chem Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)                 |
| Table 128. Huada Chem Main Business                                                                                                      |
| Table 129. Huada Chem Latest Developments                                                                                                |
| Table 130. Huide Science & Technology Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors            |
| Table 131. Huide Science & Technology Polyester Polyols Product Portfolios and Specifications                                            |
| Table 132. Huide Science & Technology Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026) |
| Table 133. Huide Science & Technology Main Business                                                                                      |
| Table 134. Huide Science & Technology Latest Developments                                                                                |
| Table 135. BCI Holding Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                           |
| Table 136. BCI Holding Polyester Polyols Product Portfolios and Specifications                                                           |
| Table 137. BCI Holding Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)                |
| Table 138. BCI Holding Main Business                                                                                                     |
| Table 139. BCI Holding Latest Developments                                                                                               |
| Table 140. Miracil Chemicals Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                     |
| Table 141. Miracil Chemicals Polyester Polyols Product Portfolios and Specifications                                                     |
| Table 142. Miracil Chemicals Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)          |

|                                                                                                                                        |
|----------------------------------------------------------------------------------------------------------------------------------------|
| Table 143. Miracil Chemicals Main Business                                                                                             |
| Table 144. Miracil Chemicals Latest Developments                                                                                       |
| Table 145. Synthesia Technology Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                |
| Table 146. Synthesia Technology Polyester Polyols Product Portfolios and Specifications                                                |
| Table 147. Synthesia Technology Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)     |
| Table 148. Synthesia Technology Main Business                                                                                          |
| Table 149. Synthesia Technology Latest Developments                                                                                    |
| Table 150. Covestro Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                            |
| Table 151. Covestro Polyester Polyols Product Portfolios and Specifications                                                            |
| Table 152. Covestro Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)                 |
| Table 153. Covestro Main Business                                                                                                      |
| Table 154. Covestro Latest Developments                                                                                                |
| Table 155. Purinova Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                            |
| Table 156. Purinova Polyester Polyols Product Portfolios and Specifications                                                            |
| Table 157. Purinova Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)                 |
| Table 158. Purinova Main Business                                                                                                      |
| Table 159. Purinova Latest Developments                                                                                                |
| Table 160. Shanghai Rising Chemical Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors            |
| Table 161. Shanghai Rising Chemical Polyester Polyols Product Portfolios and Specifications                                            |
| Table 162. Shanghai Rising Chemical Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026) |
| Table 163. Shanghai Rising Chemical Main Business                                                                                      |
| Table 164. Shanghai Rising Chemical Latest Developments                                                                                |
| Table 165. Emery Oleochemicals Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                 |
| Table 166. Emery Oleochemicals Polyester Polyols Product Portfolios and Specifications                                                 |
| Table 167. Emery Oleochemicals Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)      |
| Table 168. Emery Oleochemicals Main Business                                                                                           |

|                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------------------|
| Table 169. Emery Oleochemicals Latest Developments                                                                          |
| Table 170. Ingevity Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                 |
| Table 171. Ingevity Polyester Polyols Product Portfolios and Specifications                                                 |
| Table 172. Ingevity Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)      |
| Table 173. Ingevity Main Business                                                                                           |
| Table 174. Ingevity Latest Developments                                                                                     |
| Table 175. Arkema Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                   |
| Table 176. Arkema Polyester Polyols Product Portfolios and Specifications                                                   |
| Table 177. Arkema Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)        |
| Table 178. Arkema Main Business                                                                                             |
| Table 179. Arkema Latest Developments                                                                                       |
| Table 180. PCC Rokita SA Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors            |
| Table 181. PCC Rokita SA Polyester Polyols Product Portfolios and Specifications                                            |
| Table 182. PCC Rokita SA Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026) |
| Table 183. PCC Rokita SA Main Business                                                                                      |
| Table 184. PCC Rokita SA Latest Developments                                                                                |
| Table 185. Evonik Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                   |
| Table 186. Evonik Polyester Polyols Product Portfolios and Specifications                                                   |
| Table 187. Evonik Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)        |
| Table 188. Evonik Main Business                                                                                             |
| Table 189. Evonik Latest Developments                                                                                       |
| Table 190. DIC Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                      |
| Table 191. DIC Polyester Polyols Product Portfolios and Specifications                                                      |
| Table 192. DIC Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)           |
| Table 193. DIC Main Business                                                                                                |
| Table 194. DIC Latest Developments                                                                                          |
| Table 195. INOV Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors                     |
| Table 196. INOV Polyester Polyols Product Portfolios and Specifications                                                     |

Table 197. INOV Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 198. INOV Main Business

Table 199. INOV Latest Developments

Table 200. Polexchem Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 201. Polexchem Polyester Polyols Product Portfolios and Specifications

Table 202. Polexchem Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 203. Polexchem Main Business

Table 204. Polexchem Latest Developments

Table 205. Kimpur Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 206. Kimpur Polyester Polyols Product Portfolios and Specifications

Table 207. Kimpur Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 208. Kimpur Main Business

Table 209. Kimpur Latest Developments

Table 210. Skori New Material Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 211. Skori New Material Polyester Polyols Product Portfolios and Specifications

Table 212. Skori New Material Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 213. Skori New Material Main Business

Table 214. Skori New Material Latest Developments

Table 215. Flokser Kimya Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 216. Flokser Kimya Polyester Polyols Product Portfolios and Specifications

Table 217. Flokser Kimya Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 218. Flokser Kimya Main Business

Table 219. Flokser Kimya Latest Developments

Table 220. Kuraray Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 221. Kuraray Polyester Polyols Product Portfolios and Specifications

Table 222. Kuraray Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 223. Kuraray Main Business

Table 224. Kuraray Latest Developments

Table 225. Woojo Hightech Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 226. Woojo Hightech Polyester Polyols Product Portfolios and Specifications

Table 227. Woojo Hightech Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 228. Woojo Hightech Main Business

Table 229. Woojo Hightech Latest Developments

Table 230. Kobe Polyurethane Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 231. Kobe Polyurethane Polyester Polyols Product Portfolios and Specifications

Table 232. Kobe Polyurethane Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 233. Kobe Polyurethane Main Business

Table 234. Kobe Polyurethane Latest Developments

Table 235. NEO GROUP Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 236. NEO GROUP Polyester Polyols Product Portfolios and Specifications

Table 237. NEO GROUP Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 238. NEO GROUP Main Business

Table 239. NEO GROUP Latest Developments

Table 240. SBHPP (Sumitomo Bakelite) Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 241. SBHPP (Sumitomo Bakelite) Polyester Polyols Product Portfolios and Specifications

Table 242. SBHPP (Sumitomo Bakelite) Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 243. SBHPP (Sumitomo Bakelite) Main Business

Table 244. SBHPP (Sumitomo Bakelite) Latest Developments

Table 245. Sehotech Basic Information, Polyester Polyols Manufacturing Base, Sales Area and Its Competitors

Table 246. Sehotech Polyester Polyols Product Portfolios and Specifications

Table 247. Sehotech Polyester Polyols Sales (K MT), Revenue (\$ Million), Price (US\$/MT) and Gross Margin (2021-2026)

Table 248. Sehotech Main Business

Table 249. Sehotech Latest Developments

## List Of Figures

### LIST OF FIGURES

- Figure 1. Picture of Polyester Polyols
- Figure 2. Polyester Polyols Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Polyester Polyols Sales Growth Rate 2021-2032 (K MT)
- Figure 7. Global Polyester Polyols Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Polyester Polyols Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Polyester Polyols Sales Market Share by Country/Region (2025)
- Figure 10. Polyester Polyols Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Aliphatic Polyester Polyols
- Figure 12. Product Picture of Aromatic Polyester Polyols
- Figure 13. Product Picture of Others
- Figure 14. Global Polyester Polyols Sales Market Share by Type in 2026
- Figure 15. Global Polyester Polyols Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Petrochemical-based
- Figure 17. Product Picture of Bio-based
- Figure 18. Product Picture of Others
- Figure 19. Global Polyester Polyols Sales Market Share by Raw Material Source in 2026
- Figure 20. Global Polyester Polyols Revenue Market Share by Raw Material Source (2021-2026)
- Figure 21. Product Picture of Low MW
- Figure 22. Product Picture of High MW
- Figure 23. Global Polyester Polyols Sales Market Share by Molecular Weight in 2026
- Figure 24. Global Polyester Polyols Revenue Market Share by Molecular Weight (2021-2026)
- Figure 25. Product Picture of Liquid Type
- Figure 26. Product Picture of Solid/Semi-Solid
- Figure 27. Global Polyester Polyols Sales Market Share by Physical Form in 2026
- Figure 28. Global Polyester Polyols Revenue Market Share by Physical Form (2021-2026)
- Figure 29. Polyester Polyols Consumed in Foam

- Figure 30. Global Polyester Polyols Market: Foam (2021-2026) & (K MT)
- Figure 31. Polyester Polyols Consumed in Elastomers
- Figure 32. Global Polyester Polyols Market: Elastomers (2021-2026) & (K MT)
- Figure 33. Polyester Polyols Consumed in Adhesives and Sealants
- Figure 34. Global Polyester Polyols Market: Adhesives and Sealants (2021-2026) & (K MT)
- Figure 35. Polyester Polyols Consumed in Coatings
- Figure 36. Global Polyester Polyols Market: Coatings (2021-2026) & (K MT)
- Figure 37. Polyester Polyols Consumed in Others
- Figure 38. Global Polyester Polyols Market: Others (2021-2026) & (K MT)
- Figure 39. Global Polyester Polyols Sale Market Share by Application (2025)
- Figure 40. Global Polyester Polyols Revenue Market Share by Application in 2025
- Figure 41. Polyester Polyols Sales by Company in 2025 (K MT)
- Figure 42. Global Polyester Polyols Sales Market Share by Company in 2025
- Figure 43. Polyester Polyols Revenue by Company in 2025 (\$ millions)
- Figure 44. Global Polyester Polyols Revenue Market Share by Company in 2025
- Figure 45. Global Polyester Polyols Sales Market Share by Geographic Region (2021-2026)
- Figure 46. Global Polyester Polyols Revenue Market Share by Geographic Region in 2025
- Figure 47. Americas Polyester Polyols Sales 2021-2026 (K MT)
- Figure 48. Americas Polyester Polyols Revenue 2021-2026 (\$ millions)
- Figure 49. APAC Polyester Polyols Sales 2021-2026 (K MT)
- Figure 50. APAC Polyester Polyols Revenue 2021-2026 (\$ millions)
- Figure 51. Europe Polyester Polyols Sales 2021-2026 (K MT)
- Figure 52. Europe Polyester Polyols Revenue 2021-2026 (\$ millions)
- Figure 53. Middle East & Africa Polyester Polyols Sales 2021-2026 (K MT)
- Figure 54. Middle East & Africa Polyester Polyols Revenue 2021-2026 (\$ millions)
- Figure 55. Americas Polyester Polyols Sales Market Share by Country in 2025
- Figure 56. Americas Polyester Polyols Revenue Market Share by Country (2021-2026)
- Figure 57. Americas Polyester Polyols Sales Market Share by Type (2021-2026)
- Figure 58. Americas Polyester Polyols Sales Market Share by Application (2021-2026)
- Figure 59. United States Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 60. Canada Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 61. Mexico Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 62. Brazil Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 63. APAC Polyester Polyols Sales Market Share by Region in 2025
- Figure 64. APAC Polyester Polyols Revenue Market Share by Region (2021-2026)
- Figure 65. APAC Polyester Polyols Sales Market Share by Type (2021-2026)

- Figure 66. APAC Polyester Polyols Sales Market Share by Application (2021-2026)
- Figure 67. China Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 68. Japan Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 69. South Korea Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 70. Southeast Asia Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 71. India Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 72. Australia Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 73. China Taiwan Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 74. Europe Polyester Polyols Sales Market Share by Country in 2025
- Figure 75. Europe Polyester Polyols Revenue Market Share by Country (2021-2026)
- Figure 76. Europe Polyester Polyols Sales Market Share by Type (2021-2026)
- Figure 77. Europe Polyester Polyols Sales Market Share by Application (2021-2026)
- Figure 78. Germany Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 79. France Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 80. UK Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 81. Italy Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 82. Russia Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 83. Middle East & Africa Polyester Polyols Sales Market Share by Country (2021-2026)
- Figure 84. Middle East & Africa Polyester Polyols Sales Market Share by Type (2021-2026)
- Figure 85. Middle East & Africa Polyester Polyols Sales Market Share by Application (2021-2026)
- Figure 86. Egypt Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 87. South Africa Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 88. Israel Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 89. Turkey Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 90. GCC Countries Polyester Polyols Revenue Growth 2021-2026 (\$ millions)
- Figure 91. Manufacturing Cost Structure Analysis of Polyester Polyols in 2026
- Figure 92. Manufacturing Process Analysis of Polyester Polyols
- Figure 93. Industry Chain Structure of Polyester Polyols
- Figure 94. Channels of Distribution
- Figure 95. Global Polyester Polyols Sales Market Forecast by Region (2027-2032)
- Figure 96. Global Polyester Polyols Revenue Market Share Forecast by Region (2027-2032)
- Figure 97. Global Polyester Polyols Sales Market Share Forecast by Type (2027-2032)
- Figure 98. Global Polyester Polyols Revenue Market Share Forecast by Type (2027-2032)
- Figure 99. Global Polyester Polyols Sales Market Share Forecast by Application

(2027-2032)

Figure 100. Global Polyester Polyols Revenue Market Share Forecast by Application

(2027-2032)

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