

# Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market Report: Trends, Forecast and Competitive Analysis to 2030

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## Abstracts

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Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Trends and Forecast

The future of the global polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins market looks promising with opportunities in the bottles, films, and food packaging markets. The global polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins market is expected to reach an estimated \$45.2 billion by 2030 with a CAGR of 6.7% from 2024 to 2030. The major drivers for this market are PET being a highly recyclable plastic resin, growth in demand for PET in the packaging sector, and technological advancements in the PET packaging sector.

Lucintel forecasts that, within the type category, transparent and non-transparent PET is expected to witness the highest growth over the forecast period due to the growth in demand for PET containers, particularly in the food and beverage industry, as well as an increase in demand for frozen and processed foods.

Within this market, bottles will remain the largest segment due to increased demand in food and beverage, consumer goods, and other sectors.

In terms of regions, APAC is expected to witness the highest growth over the forecast period due to increasing demand for PET resin in different applications, especially bottles, films, and food packaging segments.

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## Emerging Trends in the Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market

The PET and PBT resin market is evolving with several emerging trends that reflect shifting consumer preferences and technological advancements. These trends include a focus on sustainability, innovations in recycling, the development of bio-based alternatives, lightweighting in automotive applications, and advancements in high-performance resins. Understanding these trends is crucial for stakeholders aiming to remain competitive in this dynamic market.

**Sustainability Initiatives:** Sustainability is becoming a key focus in the PET and PBT markets, with manufacturers increasingly adopting eco-friendly practices. Companies are investing in sustainable production methods, including the use of recycled materials and bio-based feedstocks. Regulatory pressures and consumer demand for sustainable products are driving this trend. Major brands are committing to using recycled PET in their packaging, which not only reduces waste but also lowers carbon footprints. This shift is expected to continue, with innovation in sustainable materials and processes becoming a significant competitive advantage in the market.

**Advancements in Recycling Technologies:** Innovations in recycling technologies are enhancing the efficiency and effectiveness of recycling processes for PET and PBT resins. New recycling methods, such as chemical recycling, allow for the recovery of high-quality materials from used plastics. These advancements enable the production of rPET and rPBT that meet stringent quality standards for various applications. As recycling infrastructure improves, the availability of recycled resins will increase, reducing reliance on virgin materials and supporting a circular economy. This trend is crucial for meeting sustainability goals and consumer expectations.

**Bio-Based Alternatives:** The development of bio-based PET and PBT alternatives is gaining momentum as manufacturers seek sustainable options. Bio-based resins derived from renewable sources are being explored to reduce the environmental impact of conventional plastics. These alternatives offer

similar properties to traditional PET and PBT while contributing to lower greenhouse gas emissions. As technology advances, the cost of bio-based production is expected to decrease, making these materials more competitive. This trend aligns with the global shift toward sustainable materials and is likely to drive growth in the bio-based resin segment.

**Lightweighting in Automotive Applications:** The automotive industry is increasingly focusing on lightweight materials to improve fuel efficiency and reduce emissions. PBT resins are being adopted for various automotive components due to their excellent mechanical properties and lightweight characteristics. The shift toward electric vehicles further amplifies this trend, as manufacturers seek to enhance performance while minimizing weight. By replacing traditional materials with PBT, automakers can achieve significant weight savings, improving overall vehicle efficiency. This trend is expected to continue as the automotive sector prioritizes sustainability and performance.

**High-Performance Resins:** There is a growing demand for high-performance PET and PBT resins tailored for specific applications. Innovations in resin formulations are leading to the development of high-performance materials with enhanced properties, such as improved heat resistance, chemical stability, and impact strength. These advanced resins are essential for applications in electronics, automotive, and medical devices, where performance is critical. As industries seek specialized solutions, the market for high-performance PET and PBT resins is poised for growth, driven by technological advancements and evolving application requirements.

The PET and PBT resins market is experiencing dynamic developments across key regions, driven by sustainability initiatives, technological advancements, and evolving consumer preferences. Countries like the U.S., China, Germany, India, and Japan are at the forefront of these changes, focusing on enhancing product performance while addressing environmental concerns. Emerging trends such as sustainability initiatives, advancements in recycling technologies, the development of bio-based alternatives, lightweighting in automotive applications, and the demand for high-performance resins will shape the future of the market. Stakeholders who adapt to these trends will be well-positioned to thrive in this evolving landscape.

**Recent Developments in the Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market**

The PET and PBT resin market has witnessed significant advancements driven by evolving consumer preferences, environmental concerns, and technological innovations. These developments are shaping the industry's landscape, particularly in sustainability, production processes, and application areas. As industries strive for greener alternatives and enhanced performance materials, key players are adapting to meet market demands. This outline highlights five recent developments that are pivotal for understanding the current trajectory of PET and PBT resins.

**Increased Adoption of Recycled PET (rPET):** Recent initiatives have seen a surge in the use of recycled PET (rPET) as manufacturers respond to growing environmental concerns and regulations. Companies are investing in advanced recycling technologies to reclaim post-consumer PET waste, thus reducing reliance on virgin materials. This shift not only helps minimize landfill waste but also aligns with circular economy principles, appealing to environmentally conscious consumers. The transition to rPET is expected to drive innovation in recycling processes, making the material more accessible and cost-effective for various applications, from packaging to textiles.

**Biodegradable Alternatives and Green Chemistry:** The development of biodegradable PET and PBT alternatives has gained traction, addressing consumer demands for sustainable materials. Innovations in green chemistry are leading to the formulation of bio-based polyesters derived from renewable resources. These materials offer similar performance characteristics while significantly reducing the carbon footprint. Companies are increasingly investing in R&D to create high-performance biodegradable options, catering to industries seeking eco-friendly solutions without compromising on quality. This development is likely to influence consumer purchasing decisions, pushing traditional PET and PBT toward more sustainable practices.

**Advances in Production Technology:** Recent advancements in production technology, including improved polymerization processes and energy-efficient manufacturing methods, have enhanced the efficiency and sustainability of PET and PBT resin production. Technologies such as enzymatic recycling and solvent-based methods are being explored to increase yield and reduce waste. These innovations not only lower operational costs but also minimize the environmental impact of production. As manufacturers adopt these cutting-edge technologies, the overall quality of PET and PBT resins is expected to improve, expanding their applications in various sectors, including automotive,

electronics, and packaging.

**Growth in Automotive Applications:** The demand for PET and PBT resins in the automotive sector has been on the rise, fueled by the need for lightweight and durable materials. These resins are increasingly being used in various automotive components, including interior trims, connectors, and electrical housings. Their excellent mechanical properties and resistance to heat and chemicals make them ideal for automotive applications. As the automotive industry continues to prioritize sustainability and fuel efficiency, the adoption of PET and PBT resins is anticipated to grow, driving further innovations in composite materials.

**Regulatory Compliance and Industry Standards:** Stricter regulatory frameworks and industry standards related to plastic use and recycling are influencing the PET and PBT market. Governments worldwide are implementing policies aimed at reducing plastic waste and promoting sustainable materials. As a response, manufacturers are adapting their products and processes to comply with these regulations, focusing on enhancing recyclability and reducing environmental impact. This trend is encouraging collaboration among stakeholders, leading to the development of industry-wide standards that promote the use of sustainable materials, ultimately benefiting both manufacturers and consumers.

The PET and PBT resin market is undergoing transformative changes driven by sustainability, technological advancements, and shifting consumer preferences. The increasing adoption of recycled materials, the development of biodegradable alternatives, and innovations in production processes are redefining the landscape. Furthermore, the growth in automotive applications and the need for regulatory compliance are shaping future strategies for industry players. As these developments unfold, they will not only enhance the market's resilience but also pave the way for more sustainable and innovative solutions in the resin industry.

### Strategic Growth Opportunities for Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market

The PET and PBT resins market is poised for substantial growth, driven by increasing demand across various applications, including packaging, automotive, electronics, textiles, and consumer goods. As industries become more focused on sustainability and high-performance materials, strategic opportunities are emerging that capitalize on

these trends. Companies are exploring innovations and collaborations to enhance product offerings and cater to changing consumer preferences. This outline highlights five key growth opportunities by application that could shape the future landscape of the PET and PBT resins market.

**Packaging Industry Expansion:** The packaging industry remains one of the most significant growth opportunities for PET and PBT resins. With the global shift toward sustainable packaging solutions, there is a growing demand for lightweight, recyclable materials. PET, in particular, is widely used in beverage bottles and food packaging due to its excellent barrier properties. The rise of e-commerce and on-the-go consumption further fuels the need for durable, convenient packaging. Companies investing in advanced recycling technologies and biodegradable options can position themselves as leaders in this expanding market, catering to environmentally conscious consumers.

**Automotive Lightweighting Trends:** The automotive sector presents a lucrative opportunity for PET and PBT resins, especially as manufacturers prioritize lightweight materials to enhance fuel efficiency and reduce emissions. PET and PBT's mechanical strength and heat resistance make them ideal for various automotive components, such as interior parts and electrical housings. As electric and hybrid vehicles gain traction, the demand for lightweight and durable materials will likely increase. Manufacturers that innovate in composite applications and focus on enhancing the performance characteristics of these resins can capture a significant share of this growing market.

**Electronics and Electrical Applications:** With the rise of consumer electronics and smart devices, there is a growing demand for high-performance materials in the electronics sector. PBT resins, in particular, are favored for their thermal stability, electrical insulation properties, and resistance to chemicals, making them ideal for connectors, casings, and other components. As technology advances and the demand for compact, efficient devices increases, the need for innovative and durable materials will grow. Companies that focus on developing specialized PBT formulations tailored to the electronics industry can capitalize on this trend, creating tailored solutions for diverse applications.

**Textile and Apparel Innovations:** The textile and apparel industry is embracing PET resins for their versatility and sustainability potential. PET fibers are widely used in clothing, upholstery, and industrial textiles due to their durability and ease of care. The growing consumer preference for recycled materials presents

a unique opportunity for companies to develop rPET-based fabrics. Additionally, innovations in functional textiles, such as moisture-wicking and UV-resistant fabrics, can further enhance market appeal. Brands that emphasize sustainability and performance in their textile offerings are well-positioned to capture the attention of environmentally conscious consumers.

**Consumer Goods and Household Applications:** The consumer goods sector is increasingly adopting PET and PBT resins for various applications, including household items and personal care products. These resins provide excellent durability and aesthetic qualities, making them suitable for containers, kitchenware, and personal care packaging. As consumers seek sustainable options, the demand for recyclable and reusable products is on the rise. Companies that focus on designing attractive, functional products using PET and PBT can tap into this growing market. Moreover, incorporating eco-friendly practices in production and packaging can further enhance brand loyalty among consumers.

The PET and PBT resins market offers a wealth of strategic growth opportunities across diverse applications. By focusing on the expanding packaging industry, automotive lightweighting trends, electronics innovations, textile advancements, and consumer goods demand, companies can position themselves for success in this evolving landscape. Embracing sustainability and innovation will be crucial for tapping into these opportunities, ultimately shaping the future of PET and PBT resins.

### Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market Driver and Challenges

The PET and PBT resins market is influenced by a complex interplay of technological, economic, and regulatory factors that drive growth and pose challenges. On one hand, advancements in recycling technologies, rising demand for sustainable materials, and evolving consumer preferences contribute to market expansion. On the other hand, challenges such as fluctuating raw material prices, environmental regulations, and competition from alternative materials can hinder progress. Understanding these dynamics is essential for stakeholders to navigate the market effectively and capitalize on opportunities while mitigating risks.

The factors responsible for driving the polyethylene terephthalate (PET) and polybutylene terephthalate (PBT) resins market include:

**Sustainability and Recycling Initiatives:** The increasing global emphasis on sustainability is a significant driver for the PET and PBT resins market. As consumers and businesses alike prioritize eco-friendly products, the demand for recyclable and biodegradable materials is surging. Governments are implementing stricter regulations on plastic waste, pushing companies to invest in advanced recycling technologies. The rise of rPET (recycled PET) is a direct response to this trend, with brands eager to meet consumer expectations for sustainable packaging. This focus on sustainability not only enhances brand reputation but also opens new market opportunities for companies that adopt greener practices.

**Technological Advancements in Production:** Innovations in production processes are significantly impacting the PET and PBT resins market. New manufacturing techniques, such as enzymatic recycling and improved polymerization methods, enhance the efficiency and sustainability of resin production. These advancements allow for higher yields, reduced waste, and lower energy consumption, making production more cost-effective. Additionally, innovations in material formulations are leading to improved performance characteristics, such as increased strength and temperature resistance. Companies that leverage these technologies can gain a competitive edge, responding effectively to the evolving needs of various industries.

**Growing Demand in Automotive and Electronics:** The automotive and electronics sectors are driving demand for PET and PBT resins due to their lightweight and durable properties. As manufacturers strive to enhance fuel efficiency and reduce emissions, the use of advanced materials in automotive components is on the rise. Similarly, the electronics industry requires high-performance materials for connectors, casings, and other applications. The shift towards electric and hybrid vehicles, along with the proliferation of smart devices, further fuels this demand. Companies that focus on tailoring their offerings to meet the specific requirements of these industries can capitalize on substantial growth opportunities.

**E-commerce and Convenience Packaging:** The rapid growth of e-commerce has transformed the packaging landscape, creating significant opportunities for PET and PBT resins. As online shopping continues to rise, there is an increasing demand for convenient, durable, and lightweight packaging solutions. PET is widely used in food and beverage containers due to its excellent barrier properties and recyclability. Brands that innovate in packaging design to

enhance consumer convenience while maintaining sustainability will find a receptive market. This trend not only benefits manufacturers but also aligns with consumer expectations for responsible packaging.

**Emerging Markets and Urbanization:** Emerging markets and increasing urbanization are key drivers of the PET and PBT resins market. As economies develop, consumer spending rises, leading to greater demand for packaged goods, automotive applications, and electronics. Urban populations require efficient solutions for packaging, textiles, and household products, creating vast market potential. Companies that strategically position themselves in these growing markets, particularly in Asia-Pacific and Latin America, can capture significant opportunities. Understanding local consumer preferences and regulatory environments will be crucial for successful market entry and expansion.

Challenges in the polyethylene terephthalate (PET) and polybutylene terephthalate (PBT) resins market are:

**Fluctuating Raw Material Prices:** One of the major challenges facing the PET and PBT resins market is the volatility of raw material prices, particularly petrochemical feedstocks. Price fluctuations can arise from geopolitical tensions, natural disasters, and supply chain disruptions. Such volatility impacts production costs and profitability, making it difficult for manufacturers to plan and budget effectively. Companies may be forced to absorb costs or pass them on to consumers, which could affect competitiveness. Developing strategies for supply chain management and diversifying material sources can help mitigate this challenge.

**Stringent Regulatory Compliance:** Regulatory pressures regarding environmental impact and plastic waste are intensifying, posing a significant challenge for the PET and PBT resins market. Governments worldwide are implementing stricter guidelines for plastic production and disposal, requiring companies to invest in compliance measures and sustainable practices. Navigating these regulations can be complex and costly, particularly for smaller manufacturers. Companies must stay informed about changing regulations and adapt their processes accordingly, which can divert resources from innovation and growth. Proactively adopting sustainable practices can help mitigate compliance risks.

**Competition from Alternative Materials:** The rise of alternative materials, such as bioplastics and other eco-friendly options, presents a challenge for the PET and PBT resins market. As consumers increasingly seek sustainable products, companies face pressure to differentiate their offerings. While PET and PBT have established advantages in performance, the emergence of new materials could disrupt market dynamics. To remain competitive, manufacturers must innovate and improve the sustainability profile of their products, ensuring they meet evolving consumer expectations. Collaboration with stakeholders and investment in R&D can aid in overcoming this challenge.

The PET and PBT resins market is influenced by a myriad of drivers and challenges, each shaping its future trajectory. Sustainability initiatives, technological advancements, and growing demand in key sectors present substantial growth opportunities. However, fluctuating raw material prices, stringent regulatory requirements, and competition from alternative materials pose significant challenges. By strategically addressing these challenges while leveraging growth drivers, companies can navigate this evolving landscape effectively, ensuring long-term success in the PET and PBT resins market.

#### List of Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Companies

Companies in the market compete on the basis of product quality offered. Major players in this market focus on expanding their manufacturing facilities, R&D investments, infrastructural development, and leverage integration opportunities across the value chain. Through these strategies polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins companies cater increasing demand, ensure competitive effectiveness, develop innovative products & technologies, reduce production costs, and expand their customer base. Some of the polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins companies profiled in this report include-

Indorama Ventures

Mitsubishi Chemical

SABIC

BASF

Alpek

Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins by Segment

The study includes a forecast for the global polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins by type, application, and region.

Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market by Type [Analysis by Value from 2018 to 2030]:

Recycled PET

Transparent & Non-Transparent PET

Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market by Application [Analysis by Value from 2018 to 2030]:

Bottles

Films

Food Packaging

Others

Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market by Region [Analysis by Value from 2018 to 2030]:

North America

Europe

Asia Pacific

## The Rest of the World

### Country Wise Outlook for the Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market

The polyethylene terephthalate (PET) and polybutylene terephthalate (PBT) resins market has witnessed significant developments globally, driven by increasing demand across various applications, including packaging, automotive, and electronics. With the growing emphasis on sustainability, innovations in recycling technologies and bio-based alternatives have also gained traction. Countries like the United States, China, Germany, India, and Japan are at the forefront of these developments, focusing on enhancing product performance and reducing environmental impact. This overview highlights key advancements and changes in the PET and PBT resin markets in these major economies.

**United States:** In the U.S., the PET and PBT resin markets have experienced robust growth, particularly in the packaging sector. Advances in recycling technologies have enabled the production of rPET (recycled PET), driving sustainability initiatives among manufacturers. Major companies are investing in research and development to enhance the mechanical properties and thermal resistance of PBT resins for automotive applications. Additionally, regulatory support for sustainable materials is encouraging innovation, with increased adoption of bio-based PET and PBT alternatives. This focus on eco-friendly solutions positions the U.S. market as a leader in resin innovation and sustainability.

**China:** China continues to be a dominant player in the PET and PBT resins market, largely due to its extensive manufacturing capabilities. Recent developments include the establishment of new production facilities aimed at increasing capacity and improving product quality. The Chinese government's emphasis on reducing plastic waste has led to investments in recycling infrastructure and technologies. Moreover, the automotive sector is increasingly adopting PBT resins for lightweight components, driven by the demand for fuel efficiency and performance. The Chinese market is also shifting towards higher-value applications, such as electronics and engineering plastics.

**Germany:** Germany is at the forefront of innovation in the PET and PBT resins market, with a strong emphasis on sustainability and circular economy practices.

German manufacturers are focusing on developing advanced recycling technologies to produce high-quality recycled PET. There is also a growing trend towards using bio-based raw materials in resin production, aligning with the country's stringent environmental regulations. The automotive industry is leveraging PBT resins for components that require high thermal and chemical resistance. Overall, Germany's commitment to sustainability is shaping the future landscape of the PET and PBT markets.

India: In India, the PET and PBT resins market is expanding rapidly, driven by the growing packaging industry and increasing consumer demand for sustainable products. Recent developments include investments in local manufacturing facilities to reduce dependence on imports and improve supply chain efficiency. The Indian government's initiatives to promote recycling and sustainable practices are encouraging companies to adopt eco-friendly production methods. Additionally, the automotive sector's shift towards lightweight materials is propelling the use of PBT resins. The market is witnessing a gradual transition towards higher-quality, value-added products, enhancing competitiveness.

Japan: The Japanese PET and PBT resin market is characterized by advanced technology and innovation. Recent developments include the introduction of high-performance PBT resins tailored for specific applications in the electronics and automotive sectors. Japanese manufacturers are investing heavily in research and development to enhance resin properties, such as flame resistance and impact strength. Additionally, there is a strong push towards sustainability, with companies exploring bio-based PET alternatives and improved recycling methods. Japan's focus on high-quality production and eco-friendly solutions positions it as a key player in the global PET and PBT resins market.

## Features of the Global Polyethylene Terephthalate (PET) & Polybutylene Terephthalate (PBT) Resins Market

Market Size Estimates: Polyethylene terephthalate (pet) & polybutylene terephthalate (pbt) resins market size estimation in terms of value (\$B).

Trend and Forecast Analysis: Market trends (2018 to 2023) and forecast (2024 to 2030) by various segments and regions.

**Segmentation Analysis:** Polyethylene terephthalate (pet) & polybutylene terephthalate (pbt) resins market size by type, application, and region in terms of value (\$B).

**Regional Analysis:** Polyethylene terephthalate (pet) & polybutylene terephthalate (pbt) resins market breakdown by North America, Europe, Asia Pacific, and Rest of the World.

**Growth Opportunities:** Analysis of growth opportunities in different type, application, and regions for the polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins market.

**Strategic Analysis:** This includes M&A, new product development, and competitive landscape of the polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins market.

Analysis of competitive intensity of the industry based on Porter's Five Forces model.

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This report answers following 11 key questions:

Q.1. What are some of the most promising, high-growth opportunities for the polyethylene terephthalate (PET) & polybutylene terephthalate (PBT) resins market by type (recycled pet and transparent & non-transparent pet), application (bottles, films, food packaging, and others), and region (North America, Europe, Asia Pacific, and the Rest of the World)?

Q.2. Which segments will grow at a faster pace and why?

Q.3. Which region will grow at a faster pace and why?

Q.4. What are the key factors affecting market dynamics? What are the key challenges and business risks in this market?

Q.5. What are the business risks and competitive threats in this market?

Q.6. What are the emerging trends in this market and the reasons behind them?

Q.7. What are some of the changing demands of customers in the market?

Q.8. What are the new developments in the market? Which companies are leading these developments?

Q.9. Who are the major players in this market? What strategic initiatives are key players pursuing for business growth?

Q.10. What are some of the competing products in this market and how big of a threat do they pose for loss of market share by material or product substitution?

Q.11. What M&A activity has occurred in the last 5 years and what has its impact been on the industry?

## Contents

### 1. EXECUTIVE SUMMARY

### 2. GLOBAL POLYETHYLENE TEREPHTHALATE (PET) & POLYBUTYLENE TEREPHTHALATE (PBT) RESINS MARKET : MARKET DYNAMICS

2.1: Introduction, Background, and Classifications

2.2: Supply Chain

2.3: Industry Drivers and Challenges

### 3. MARKET TRENDS AND FORECAST ANALYSIS FROM 2018 TO 2030

3.1. Macroeconomic Trends (2018-2023) and Forecast (2024-2030)

3.2. Global Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market Trends (2018-2023) and Forecast (2024-2030)

3.3: Global Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market by Type

3.3.1: Recycled PET

3.3.2: Transparent & Non-Transparent PET

3.4: Global Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market by Application

3.4.1: Bottles

3.4.2: Films

3.4.3: Food Packaging

3.4.4: Others

### 4. MARKET TRENDS AND FORECAST ANALYSIS BY REGION FROM 2018 TO 2030

4.1: Global Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market by Region

4.2: North American Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market

4.2.1: North American Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market by Type: Recycled PET and Transparent & Non-Transparent PET

4.2.2: North American Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market by Application: Bottles, Films, Food Packaging, and Others

4.3: European Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)

## Resins Market

4.3.1: European Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)  
Resins Market by Type: Recycled PET and Transparent & Non-Transparent PET

4.3.2: European Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)  
Resins Market by Application: Bottles, Films, Food Packaging, and Others

4.4: APAC Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins  
Market

4.4.1: APAC Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)  
Resins Market by Type: Recycled PET and Transparent & Non-Transparent PET

4.4.2: APAC Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)  
Resins Market by Application: Bottles, Films, Food Packaging, and Others

4.5: ROW Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins  
Market

4.5.1: ROW Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)  
Resins Market by Type: Recycled PET and Transparent & Non-Transparent PET

4.5.2: ROW Polyethylene Terephthalate (Pet) & Polybutylene Terephthalate (Pbt)  
Resins Market by Application: Bottles, Films, Food Packaging, and Others

## 5. COMPETITOR ANALYSIS

5.1: Product Portfolio Analysis

5.2: Operational Integration

## 6. GROWTH OPPORTUNITIES AND STRATEGIC ANALYSIS

6.1: Growth Opportunity Analysis

6.1.1: Growth Opportunities for the Global Polyethylene Terephthalate (Pet) &  
Polybutylene Terephthalate (Pbt) Resins Market by Type

6.1.2: Growth Opportunities for the Global Polyethylene Terephthalate (Pet) &  
Polybutylene Terephthalate (Pbt) Resins Market by Application

6.1.3: Growth Opportunities for the Global Polyethylene Terephthalate (Pet) &  
Polybutylene Terephthalate (Pbt) Resins Market by Region

6.2: Emerging Trends in the Global Polyethylene Terephthalate (Pet) & Polybutylene  
Terephthalate (Pbt) Resins Market

6.3: Strategic Analysis

6.3.1: New Product Development

6.3.2: Capacity Expansion of the Global Polyethylene Terephthalate (Pet) &  
Polybutylene Terephthalate (Pbt) Resins Market

6.3.3: Mergers, Acquisitions, and Joint Ventures in the Global Polyethylene

## Terephthalate (Pet) & Polybutylene Terephthalate (Pbt) Resins Market

### 6.3.4: Certification and Licensing

## **7. COMPANY PROFILES OF LEADING PLAYERS**

7.1: Indorama Ventures

7.2: Mitsubishi Chemical

7.3: SABIC

7.4: BASF

7.5: Alpek

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