

# **Diethylene Glycol (DEG) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

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## **Abstracts**

### **Diethylene Glycol (DEG) Market Summary**

#### **Introduction**

Diethylene Glycol (DEG) is a clear, colorless, and hygroscopic diol produced as a co-product of ethylene glycol manufacturing, valued for its solvent properties, humectant capabilities, and chemical reactivity. It serves as a key ingredient in applications such as unsaturated polyester resins for composites, polyurethanes for coatings and foams, softeners for cellophane, plasticizers for flexible materials, grinding aids in cement production, and various other industrial uses. The DEG industry is a significant segment of the petrochemical derivatives market, characterized by its dependence on ethylene feedstock, large-scale production processes, and sensitivity to downstream industrial demand. The market is driven by growing demand for construction materials, flexible plastics, and industrial chemicals, particularly in emerging economies, supported by industrial expansion and infrastructure development. However, it faces challenges from volatile raw material prices, environmental regulations, and competition from alternative glycols, shaping its growth within a competitive global landscape.

#### **Market Size and Growth Forecast**

Research suggests the global DEG market is estimated at USD 2.7 to 3.3 billion in 2025, with a projected compound annual growth rate (CAGR) of 2.7% to 3.7% from 2025 to 2030, reaching approximately USD 3.2 to 4.1 billion by 2030. This growth reflects steady demand from key industrial applications, moderated by market maturity and supply chain dynamics in some regions.

#### **Regional Analysis**

**North America:** Holds 20-25% market share, with a growth rate of 2-3%. The region's growth is driven by a mature industrial base and demand for unsaturated polyester and plasticizers, with the United States leading in industrial applications, and Canada supporting construction uses. The market benefits from established manufacturing, though growth is tempered by regulatory oversight.

**Europe:** Accounts for 15-20% market share, with a growth rate of 1-2%. Demand is steady in countries like Germany, France, and the UK, known for their industrial and chemical sectors, with a focus on sustainable materials. Europe's market is constrained by stringent environmental policies favoring greener alternatives.

**Asia Pacific:** Represents 45-50% market share, with the fastest growth rate of 4-5%. Growth is fueled by rapid industrialization, construction, and manufacturing, particularly in China, India, and Japan. China's dominance in polyester production and India's infrastructure growth are key drivers, supported by rising industrial demand.

**Rest of the World:** Holds 10-15% market share, growing at 3-4%, driven by emerging economies in Latin America and the Middle East, where industrial and construction sectors boost demand. Brazil and the UAE see growth due to manufacturing and infrastructure needs.

Market trends in key consuming countries like China and India emphasize unsaturated polyester and plasticizer applications, while the US and Germany focus on high-performance and sustainable uses, with Asia Pacific leading growth due to industrial scale.

### Application Analysis

The DEG market is segmented by application, with estimated growth rates based on industry characteristics:

**Unsaturated Polyester:** Expected to grow at 3-4%, used in composites for construction, automotive, and marine applications, with steady demand driven by infrastructure needs. Trends focus on durable, corrosion-resistant materials.

**Polyurethane:** Projected to grow at 2-3%, applied in coatings, foams, and adhesives, with moderate demand reflecting industrial and construction uses. Advances in flexible formulations enhance its adoption.

**Softeners for Cellophane:** Expected to grow at 1-2%, used in cellophane production for packaging, with limited demand due to declining traditional packaging uses. Trends emphasize niche specialty applications.

**Plasticizers:** Projected to grow at 4-5%, applied in flexible plastics for packaging and industrial products, with higher growth driven by manufacturing and consumer goods expansion. Trends focus on enhancing flexibility and sustainability.

**Grinding Aids:** Expected to grow at 2-3%, used in cement production to improve efficiency, with steady demand reflecting construction growth. Trends emphasize

process optimization.

Others: Including minor uses like antifreeze and chemical intermediates, expected to grow at 2-3%, with steady demand reflecting diverse applications. Development trends explore new industrial uses.

Trends indicate a shift toward plasticizer growth in flexible materials, while unsaturated polyester maintains steady demand in composites, with innovations improving performance across applications.

### Key Market Players

Leading companies in the DEG market include:

**Shell Chemicals:** A global leader in petrochemicals, offering DEG for industrial and plasticizer applications.

**BASF:** Specializes in chemicals, providing DEG for coatings and polyurethane uses.

**Dow:** Known for diverse chemical products, supplying DEG for industrial and construction applications.

**INEOS:** Focuses on petrochemical intermediates, offering DEG for polyester and plasticizer markets.

**SABIC:** A major producer, providing DEG for industrial applications in Asia and beyond.

These companies compete on production capacity, quality, and pricing, shaping the market through innovation and strategic expansions.

### Porter's Five Forces Analysis

The competitive dynamics of the DEG market can be analyzed using the Porter Five Force Model:

**Threat of New Entrants:** Low to medium, due to high capital costs, economies of scale, and established supply chains, though opportunities in emerging markets may attract new players.

**Threat of Substitutes:** Medium, as alternative glycols like propylene glycol compete in some applications, but DEG's unique properties maintain its edge in polyester and plasticizer production.

**Bargaining Power of Buyers:** High, particularly from large industrial and manufacturing firms that can negotiate pricing and demand alternatives, influencing market dynamics.

**Bargaining Power of Suppliers:** Medium, with ethylene suppliers having some influence, but diversified sourcing and large-scale production reduce dependency risks.

**Competitive Rivalry:** High, among major global producers competing on cost, production efficiency, and innovation, driving advancements in capacity and sustainability.

### Impact of Tariff Conflicts on Supply Chain Localization

Tariff conflicts and trade tensions, particularly between key petrochemical regions like

the US, China, and the Middle East, can disrupt the DEG supply chain, especially for ethylene feedstock and finished products. Rising tariffs increase production and import costs, prompting manufacturers to localize supply chains to mitigate risks. This shift could lead to enhanced production in North America and Europe, reducing reliance on imports from Asia Pacific and the Middle East, where producers like SABIC dominate. Localization may raise short-term costs due to infrastructure investments but could enhance long-term supply stability, particularly for unsaturated polyester and plasticizer applications. The trend also encourages regional sourcing strategies and alternative supply partnerships, influencing pricing and availability across markets, especially in cost-sensitive industrial and construction segments.

### Market Opportunities and Challenges

The Diethylene Glycol market presents several opportunities and challenges that shape its future trajectory:

#### Opportunities

- Growing demand for unsaturated polyester and plasticizers in construction and manufacturing, driven by infrastructure development and industrial needs, boosting DEG usage.
- Technological advancements in sustainable production, enhancing DEG's appeal in eco-friendly applications, opening new market segments.
- Expansion into emerging markets with rising industrial demand, particularly in Asia Pacific and Latin America, where construction and manufacturing sectors fuel growth.

#### Challenges

- Volatile ethylene prices, impacting production costs and profitability, requiring effective cost management strategies.
- Regulatory pressures on petrochemical emissions and chemical safety, raising compliance costs and pushing for greener alternatives.
- Supply chain vulnerabilities due to tariff conflicts and reliance on global trade, necessitating robust sourcing and localization strategies.

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