

Polytrimethylene Ether Glycol (PO3G) Market Forecasts to 2032 – Global Analysis By Product Type (Bio-based and Petroleum-based), Sales Channel (Direct Sales, Distributors and Chemical Suppliers, E- commerce Platforms and Industry-Specific Channels), Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Polytrimethylene Ether Glycol (PO3G) Market is accounted for \$671.74 million in 2025 and is expected to reach \$1394.6 million by 2032 growing at a CAGR of 11.0% during the forecast period. Polytrimethylene Ether Glycol (PO3G) is a bio-based polyether glycol derived primarily from renewable resources like corn sugar through the fermentation of 1,3-propanediol. It features a unique molecular structure that imparts flexibility, durability, and low toxicity, making it an eco-friendly alternative to traditional petroleum-based polyols. PO3G is commonly used in the production of polyurethanes, spandex fibers, coatings, adhesives, and personal care products. Its excellent hydrolytic stability, low volatility, and superior mechanical properties enhance product performance while supporting sustainable manufacturing practices and reducing environmental impact.

Market Dynamics:

Driver:

Growing demand for sustainable and eco-friendly materials

The market is witnessing a surge in demand driven by the growing emphasis on sustainability and eco-friendly materials. Consumers and industries alike are shifting

toward bio-based alternatives to reduce environmental impact. PO3G, derived from renewable sources like corn sugar, offers superior performance and lower carbon footprint compared to petroleum-based glycols. Its applications in textiles, automotive, and personal care industries are expanding, reflecting a broader commitment to green chemistry and circular economy principles across global markets.

Restraint:

Supply chain optimization

While supply chain optimization in the market aims to enhance efficiency and reduce costs, it can also have negative effects. Over-centralization of production or reliance on limited suppliers may lead to vulnerabilities during disruptions, such as geopolitical tensions or raw material shortages. Additionally, aggressive cost-cutting can compromise product quality or delay innovation. These risks may impact consistent supply, hinder responsiveness to market demand, and ultimately affect customer satisfaction and long-term growth in the market.

Opportunity:

Superior performance characteristics

Polytrimethylene Ether Glycol (PO3G) offers superior performance characteristics that are driving its growth across various industries. Its excellent elasticity, low-temperature flexibility, and high hydrolytic stability make it ideal for applications in textiles, coatings, adhesives, and automotive sectors. PO3G also exhibits lower volatility, enhanced durability, and improved mechanical strength compared to traditional glycols. Additionally, its bio-based origin supports sustainability goals, appealing to eco-conscious manufacturers. These advanced properties position PO3G as a high-performance, versatile alternative in both existing and emerging markets.

Threat:

Higher production costs

Higher production costs in the market pose significant challenges, especially for manufacturers striving to remain competitive. These increased costs, driven by factors like raw material prices, energy consumption, and advanced bio-based processing technologies, can lead to higher end-product prices. This may reduce market demand,

particularly in cost-sensitive sectors, and limit adoption in emerging markets. Additionally, higher costs can strain profit margins, discourage investment in innovation, and create barriers for smaller players trying to enter the market.

Covid-19 Impact

The COVID-19 pandemic significantly impacted the market by disrupting global supply chains, delaying production, and reducing industrial demand. Lockdowns and restrictions led to workforce shortages and logistical challenges, affecting the timely delivery of raw materials and finished products. Additionally, reduced activity in key end-use sectors like automotive, textiles, and construction slowed market growth. However, the pandemic also highlighted the need for sustainable materials, potentially boosting long-term interest in bio-based PO3G as industries recover and prioritize resilience.

The textiles & apparel segment is expected to be the largest during the forecast period

The textiles & apparel segment is expected to account for the largest market share during the forecast period. It enhances the elasticity, durability, and comfort of fabrics, making it ideal for activewear, sportswear, and high-performance textiles. PO3G's application in spandex fibers and synthetic leathers aligns with the growing consumer demand for sustainable and eco-friendly products. This trend is particularly evident in regions like Asia-Pacific, where rapid industrialization and a strong textile manufacturing base drive the adoption of PO3G in textile production.

The industrial segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the industrial segment is predicted to witness the highest growth rate. In the automotive sector, PO3G-based materials contribute to manufacturing lightweight components, improving fuel efficiency and vehicle performance. The medical industry benefits from PO3G's biocompatibility, utilizing it in devices like catheters and surgical gloves. Additionally, PO3G's application in industrial goods such as belts, hoses, and seals is growing, owing to its durability and environmental compliance. These diverse applications underscore PO3G's versatility and its alignment with industries' sustainability objectives.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to increasing demand in various industries such as automotive, textiles, and

packaging. The rise in production of bio-based polymers and eco-friendly materials drives the adoption of PO3G, especially in countries like China, Japan, and India. Government initiatives promoting sustainable development and the expanding consumer base for green products further fuel market expansion, making the region a key player in global PO3G production and consumption.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, driven by technological advancements and a strong emphasis on sustainability. The well-established consumer goods and automotive sectors are actively seeking materials that enhance product performance while reducing environmental impact, further bolstering PO3G adoption in the region. Additionally, growing environmental awareness and regulatory support are encouraging the adoption of bio-based materials like PO3G.

Key players in the market

Some of the key players profiled in the Polytrimethylene Ether Glycol (PO3G) Market include BASF SE, Mitsubishi Chemical Corporation, Korea PTG Co., Ltd., LyondellBasell Industries Holdings BV, Asahi Kasei Corporation, Toray Industries, Inc., Shell Chemicals, Covestro AG, Huntsman Corporation, Sinopec Great Wall Energy Chemical Co., Ltd., The Dow Chemical Company, Dairen Chemical Corporation, INVISTA, Shanxi Sanwei Group Co., Ltd. and TSR CHEM.

Key Developments:

In May 2025, LyondellBasell (LYB) and Covestro have jointly decided to permanently close the Propylene Oxide Styrene and Monomer (POSM) production unit (PO11) at the Maasvlakte site in the Netherlands. This decision comes after thorough and careful consideration and is driven by the continued pressure on Maasvlakte's profitability due to global overcapacities, a strong increase of imports from Asia and high costs of European production.

In February 2025, Huntsman, a global leader in the development of innovative polyurethane-based coatings materials, will be exhibiting at the European Coatings Show (ECS) in March. Taking part in the trade fair and product conference, Huntsman will highlight some of its most recent product developments, including a new coating system containing up to 20% circular content.

Product Types Covered:

Bio-based

Petroleum-based

Sales Channels Covered:

Direct Sales

Distributors and Chemical Suppliers

E-commerce Platforms

Industry-Specific Channels

Applications Covered:

Textiles & Apparel

Footwear

Coatings & Sealants

3D Printing

Other Applications

End Users Covered:

Automotive

Industrial

Cosmetics

Consumer Goods

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends

- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 Application Analysis
- 3.8 End User Analysis
- 3.9 Emerging Markets
- 3.10 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL POLYTRIMETHYLENE ETHER GLYCOL (PO3G) MARKET, BY PRODUCT TYPE

- 5.1 Introduction
- 5.2 Bio-based
- 5.3 Petroleum-based

6 GLOBAL POLYTRIMETHYLENE ETHER GLYCOL (PO3G) MARKET, BY SALES CHANNEL

- 6.1 Introduction
- 6.2 Direct Sales
- 6.3 Distributors and Chemical Suppliers
- 6.4 E-commerce Platforms
- 6.5 Industry-Specific Channels

7 GLOBAL POLYTRIMETHYLENE ETHER GLYCOL (PO3G) MARKET, BY APPLICATION

- 7.1 Introduction
- 7.2 Textiles & Apparel
- 7.3 Footwear
- 7.4 Coatings & Sealants
- 7.5 3D Printing
- 7.6 Other Applications

8 GLOBAL POLYTRIMETHYLENE ETHER GLYCOL (PO3G) MARKET, BY END USER

- 8.1 Introduction
- 8.2 Automotive
- 8.3 Industrial
- 8.4 Cosmetics
- 8.5 Consumer Goods
- 8.6 Other End Users

9 GLOBAL POLYTRIMETHYLENE ETHER GLYCOL (PO3G) MARKET, BY GEOGRAPHY

- 9.1 Introduction
- 9.2 North America
 - 9.2.1 US
 - 9.2.2 Canada
 - 9.2.3 Mexico
- 9.3 Europe
 - 9.3.1 Germany
 - 9.3.2 UK
 - 9.3.3 Italy
 - 9.3.4 France
 - 9.3.5 Spain
 - 9.3.6 Rest of Europe
- 9.4 Asia Pacific
 - 9.4.1 Japan
 - 9.4.2 China
 - 9.4.3 India
 - 9.4.4 Australia
 - 9.4.5 New Zealand
 - 9.4.6 South Korea
 - 9.4.7 Rest of Asia Pacific
- 9.5 South America
 - 9.5.1 Argentina
 - 9.5.2 Brazil
 - 9.5.3 Chile
 - 9.5.4 Rest of South America
- 9.6 Middle East & Africa
 - 9.6.1 Saudi Arabia
 - 9.6.2 UAE
 - 9.6.3 Qatar
 - 9.6.4 South Africa
 - 9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

- 10.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 10.2 Acquisitions & Mergers
- 10.3 New Product Launch
- 10.4 Expansions

12.5 Other Key Strategies

11 COMPANY PROFILING

11.1 BASF SE

11.2 Mitsubishi Chemical Corporation

11.3 Korea PTG Co., Ltd.

11.4 LyondellBasell Industries Holdings BV

11.5 Asahi Kasei Corporation

11.6 Toray Industries, Inc.

11.7 Shell Chemicals

11.8 Covestro AG

11.9 Huntsman Corporation

11.10 Sinopec Great Wall Energy Chemical Co., Ltd.

11.11 The Dow Chemical Company

11.12 Dairen Chemical Corporation

11.13 INVISTA

11.14 Shanxi Sanwei Group Co., Ltd.

11.15 TSR CHEM

List Of Tables

LIST OF TABLES

- 1 Global Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Region (2024-2032) (\$MN)
- 2 Global Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Product Type (2024-2032) (\$MN)
- 3 Global Polytrimethylene Ether Glycol (PO4G) Market Outlook, By Bio-based (2024-2032) (\$MN)
- 4 Global Polytrimethylene Ether Glycol (PO5G) Market Outlook, By Petroleum-based (2024-2032) (\$MN)
- 5 Global Polytrimethylene Ether Glycol (PO6G) Market Outlook, By Sales Channel (2024-2032) (\$MN)
- 6 Global Polytrimethylene Ether Glycol (PO7G) Market Outlook, By Direct Sales (2024-2032) (\$MN)
- 7 Global Polytrimethylene Ether Glycol (PO8G) Market Outlook, By Distributors and Chemical Suppliers (2024-2032) (\$MN)
- 8 Global Polytrimethylene Ether Glycol (PO9G) Market Outlook, By E-commerce Platforms (2024-2032) (\$MN)
- 9 Global Polytrimethylene Ether Glycol (PO10G) Market Outlook, By Industry-Specific Channels (2024-2032) (\$MN)
- 10 Global Polytrimethylene Ether Glycol (PO11G) Market Outlook, By Application (2024-2032) (\$MN)
- 11 Global Polytrimethylene Ether Glycol (PO12G) Market Outlook, By Textiles & Apparel (2024-2032) (\$MN)
- 12 Global Polytrimethylene Ether Glycol (PO13G) Market Outlook, By Footwear (2024-2032) (\$MN)
- 13 Global Polytrimethylene Ether Glycol (PO14G) Market Outlook, By Coatings & Sealants (2024-2032) (\$MN)
- 14 Global Polytrimethylene Ether Glycol (PO15G) Market Outlook, By 3D Printing (2024-2032) (\$MN)
- 15 Global Polytrimethylene Ether Glycol (PO16G) Market Outlook, By Other Applications (2024-2032) (\$MN)
- 16 Global Polytrimethylene Ether Glycol (PO17G) Market Outlook, By End User (2024-2032) (\$MN)
- 17 Global Polytrimethylene Ether Glycol (PO18G) Market Outlook, By Automotive (2024-2032) (\$MN)
- 18 Global Polytrimethylene Ether Glycol (PO19G) Market Outlook, By Industrial

(2024-2032) (\$MN)

19 Global Polytrimethylene Ether Glycol (PO20G) Market Outlook, By Cosmetics

(2024-2032) (\$MN)

20 Global Polytrimethylene Ether Glycol (PO21G) Market Outlook, By Consumer Goods

(2024-2032) (\$MN)

21 Global Polytrimethylene Ether Glycol (PO22G) Market Outlook, By Other End Users

(2024-2032) (\$MN)

22 North America Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Country

(2024-2032) (\$MN)

23 North America Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Product Type (2024-2032) (\$MN)

24 North America Polytrimethylene Ether Glycol (PO4G) Market Outlook, By Bio-based (2024-2032) (\$MN)

25 North America Polytrimethylene Ether Glycol (PO5G) Market Outlook, By Petroleum-based (2024-2032) (\$MN)

26 North America Polytrimethylene Ether Glycol (PO6G) Market Outlook, By Sales Channel (2024-2032) (\$MN)

27 North America Polytrimethylene Ether Glycol (PO7G) Market Outlook, By Direct Sales (2024-2032) (\$MN)

28 North America Polytrimethylene Ether Glycol (PO8G) Market Outlook, By Distributors and Chemical Suppliers (2024-2032) (\$MN)

29 North America Polytrimethylene Ether Glycol (PO9G) Market Outlook, By E-commerce Platforms (2024-2032) (\$MN)

30 North America Polytrimethylene Ether Glycol (PO10G) Market Outlook, By Industry-Specific Channels (2024-2032) (\$MN)

31 North America Polytrimethylene Ether Glycol (PO11G) Market Outlook, By Application (2024-2032) (\$MN)

32 North America Polytrimethylene Ether Glycol (PO12G) Market Outlook, By Textiles & Apparel (2024-2032) (\$MN)

33 North America Polytrimethylene Ether Glycol (PO13G) Market Outlook, By Footwear (2024-2032) (\$MN)

34 North America Polytrimethylene Ether Glycol (PO14G) Market Outlook, By Coatings & Sealants (2024-2032) (\$MN)

35 North America Polytrimethylene Ether Glycol (PO15G) Market Outlook, By 3D Printing (2024-2032) (\$MN)

36 North America Polytrimethylene Ether Glycol (PO16G) Market Outlook, By Other Applications (2024-2032) (\$MN)

37 North America Polytrimethylene Ether Glycol (PO17G) Market Outlook, By End User (2024-2032) (\$MN)

- 38 North America Polytrimethylene Ether Glycol (PO18G) Market Outlook, By Automotive (2024-2032) (\$MN)
- 39 North America Polytrimethylene Ether Glycol (PO19G) Market Outlook, By Industrial (2024-2032) (\$MN)
- 40 North America Polytrimethylene Ether Glycol (PO20G) Market Outlook, By Cosmetics (2024-2032) (\$MN)
- 41 North America Polytrimethylene Ether Glycol (PO21G) Market Outlook, By Consumer Goods (2024-2032) (\$MN)
- 42 North America Polytrimethylene Ether Glycol (PO22G) Market Outlook, By Other End Users (2024-2032) (\$MN)
- 43 Europe Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Country (2024-2032) (\$MN)
- 44 Europe Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Product Type (2024-2032) (\$MN)
- 45 Europe Polytrimethylene Ether Glycol (PO4G) Market Outlook, By Bio-based (2024-2032) (\$MN)
- 46 Europe Polytrimethylene Ether Glycol (PO5G) Market Outlook, By Petroleum-based (2024-2032) (\$MN)
- 47 Europe Polytrimethylene Ether Glycol (PO6G) Market Outlook, By Sales Channel (2024-2032) (\$MN)
- 48 Europe Polytrimethylene Ether Glycol (PO7G) Market Outlook, By Direct Sales (2024-2032) (\$MN)
- 49 Europe Polytrimethylene Ether Glycol (PO8G) Market Outlook, By Distributors and Chemical Suppliers (2024-2032) (\$MN)
- 50 Europe Polytrimethylene Ether Glycol (PO9G) Market Outlook, By E-commerce Platforms (2024-2032) (\$MN)
- 51 Europe Polytrimethylene Ether Glycol (PO10G) Market Outlook, By Industry-Specific Channels (2024-2032) (\$MN)
- 52 Europe Polytrimethylene Ether Glycol (PO11G) Market Outlook, By Application (2024-2032) (\$MN)
- 53 Europe Polytrimethylene Ether Glycol (PO12G) Market Outlook, By Textiles & Apparel (2024-2032) (\$MN)
- 54 Europe Polytrimethylene Ether Glycol (PO13G) Market Outlook, By Footwear (2024-2032) (\$MN)
- 55 Europe Polytrimethylene Ether Glycol (PO14G) Market Outlook, By Coatings & Sealants (2024-2032) (\$MN)
- 56 Europe Polytrimethylene Ether Glycol (PO15G) Market Outlook, By 3D Printing (2024-2032) (\$MN)
- 57 Europe Polytrimethylene Ether Glycol (PO16G) Market Outlook, By Other

Applications (2024-2032) (\$MN)

58 Europe Polytrimethylene Ether Glycol (PO17G) Market Outlook, By End User (2024-2032) (\$MN)

59 Europe Polytrimethylene Ether Glycol (PO18G) Market Outlook, By Automotive (2024-2032) (\$MN)

60 Europe Polytrimethylene Ether Glycol (PO19G) Market Outlook, By Industrial (2024-2032) (\$MN)

61 Europe Polytrimethylene Ether Glycol (PO20G) Market Outlook, By Cosmetics (2024-2032) (\$MN)

62 Europe Polytrimethylene Ether Glycol (PO21G) Market Outlook, By Consumer Goods (2024-2032) (\$MN)

63 Europe Polytrimethylene Ether Glycol (PO22G) Market Outlook, By Other End Users (2024-2032) (\$MN)

64 Asia Pacific Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Country (2024-2032) (\$MN)

65 Asia Pacific Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Product Type (2024-2032) (\$MN)

66 Asia Pacific Polytrimethylene Ether Glycol (PO4G) Market Outlook, By Bio-based (2024-2032) (\$MN)

67 Asia Pacific Polytrimethylene Ether Glycol (PO5G) Market Outlook, By Petroleum-based (2024-2032) (\$MN)

68 Asia Pacific Polytrimethylene Ether Glycol (PO6G) Market Outlook, By Sales Channel (2024-2032) (\$MN)

69 Asia Pacific Polytrimethylene Ether Glycol (PO7G) Market Outlook, By Direct Sales (2024-2032) (\$MN)

70 Asia Pacific Polytrimethylene Ether Glycol (PO8G) Market Outlook, By Distributors and Chemical Suppliers (2024-2032) (\$MN)

71 Asia Pacific Polytrimethylene Ether Glycol (PO9G) Market Outlook, By E-commerce Platforms (2024-2032) (\$MN)

72 Asia Pacific Polytrimethylene Ether Glycol (PO10G) Market Outlook, By Industry-Specific Channels (2024-2032) (\$MN)

73 Asia Pacific Polytrimethylene Ether Glycol (PO11G) Market Outlook, By Application (2024-2032) (\$MN)

74 Asia Pacific Polytrimethylene Ether Glycol (PO12G) Market Outlook, By Textiles & Apparel (2024-2032) (\$MN)

75 Asia Pacific Polytrimethylene Ether Glycol (PO13G) Market Outlook, By Footwear (2024-2032) (\$MN)

76 Asia Pacific Polytrimethylene Ether Glycol (PO14G) Market Outlook, By Coatings & Sealants (2024-2032) (\$MN)

- 77 Asia Pacific Polytrimethylene Ether Glycol (PO15G) Market Outlook, By 3D Printing (2024-2032) (\$MN)
- 78 Asia Pacific Polytrimethylene Ether Glycol (PO16G) Market Outlook, By Other Applications (2024-2032) (\$MN)
- 79 Asia Pacific Polytrimethylene Ether Glycol (PO17G) Market Outlook, By End User (2024-2032) (\$MN)
- 80 Asia Pacific Polytrimethylene Ether Glycol (PO18G) Market Outlook, By Automotive (2024-2032) (\$MN)
- 81 Asia Pacific Polytrimethylene Ether Glycol (PO19G) Market Outlook, By Industrial (2024-2032) (\$MN)
- 82 Asia Pacific Polytrimethylene Ether Glycol (PO20G) Market Outlook, By Cosmetics (2024-2032) (\$MN)
- 83 Asia Pacific Polytrimethylene Ether Glycol (PO21G) Market Outlook, By Consumer Goods (2024-2032) (\$MN)
- 84 Asia Pacific Polytrimethylene Ether Glycol (PO22G) Market Outlook, By Other End Users (2024-2032) (\$MN)
- 85 South America Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Country (2024-2032) (\$MN)
- 86 South America Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Product Type (2024-2032) (\$MN)
- 87 South America Polytrimethylene Ether Glycol (PO4G) Market Outlook, By Bio-based (2024-2032) (\$MN)
- 88 South America Polytrimethylene Ether Glycol (PO5G) Market Outlook, By Petroleum-based (2024-2032) (\$MN)
- 89 South America Polytrimethylene Ether Glycol (PO6G) Market Outlook, By Sales Channel (2024-2032) (\$MN)
- 90 South America Polytrimethylene Ether Glycol (PO7G) Market Outlook, By Direct Sales (2024-2032) (\$MN)
- 91 South America Polytrimethylene Ether Glycol (PO8G) Market Outlook, By Distributors and Chemical Suppliers (2024-2032) (\$MN)
- 92 South America Polytrimethylene Ether Glycol (PO9G) Market Outlook, By E-commerce Platforms (2024-2032) (\$MN)
- 93 South America Polytrimethylene Ether Glycol (PO10G) Market Outlook, By Industry-Specific Channels (2024-2032) (\$MN)
- 94 South America Polytrimethylene Ether Glycol (PO11G) Market Outlook, By Application (2024-2032) (\$MN)
- 95 South America Polytrimethylene Ether Glycol (PO12G) Market Outlook, By Textiles & Apparel (2024-2032) (\$MN)
- 96 South America Polytrimethylene Ether Glycol (PO13G) Market Outlook, By Footwear

(2024-2032) (\$MN)

97 South America Polytrimethylene Ether Glycol (PO14G) Market Outlook, By Coatings & Sealants (2024-2032) (\$MN)

98 South America Polytrimethylene Ether Glycol (PO15G) Market Outlook, By 3D Printing (2024-2032) (\$MN)

99 South America Polytrimethylene Ether Glycol (PO16G) Market Outlook, By Other Applications (2024-2032) (\$MN)

100 South America Polytrimethylene Ether Glycol (PO17G) Market Outlook, By End User (2024-2032) (\$MN)

101 South America Polytrimethylene Ether Glycol (PO18G) Market Outlook, By Automotive (2024-2032) (\$MN)

102 South America Polytrimethylene Ether Glycol (PO19G) Market Outlook, By Industrial (2024-2032) (\$MN)

103 South America Polytrimethylene Ether Glycol (PO20G) Market Outlook, By Cosmetics (2024-2032) (\$MN)

104 South America Polytrimethylene Ether Glycol (PO21G) Market Outlook, By Consumer Goods (2024-2032) (\$MN)

105 South America Polytrimethylene Ether Glycol (PO22G) Market Outlook, By Other End Users (2024-2032) (\$MN)

106 Middle East & Africa Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Country (2024-2032) (\$MN)

107 Middle East & Africa Polytrimethylene Ether Glycol (PO3G) Market Outlook, By Product Type (2024-2032) (\$MN)

108 Middle East & Africa Polytrimethylene Ether Glycol (PO4G) Market Outlook, By Bio-based (2024-2032) (\$MN)

109 Middle East & Africa Polytrimethylene Ether Glycol (PO5G) Market Outlook, By Petroleum-based (2024-2032) (\$MN)

110 Middle East & Africa Polytrimethylene Ether Glycol (PO6G) Market Outlook, By Sales Channel (2024-2032) (\$MN)

111 Middle East & Africa Polytrimethylene Ether Glycol (PO7G) Market Outlook, By Direct Sales (2024-2032) (\$MN)

112 Middle East & Africa Polytrimethylene Ether Glycol (PO8G) Market Outlook, By Distributors and Chemical Suppliers (2024-2032) (\$MN)

113 Middle East & Africa Polytrimethylene Ether Glycol (PO9G) Market Outlook, By E-commerce Platforms (2024-2032) (\$MN)

114 Middle East & Africa Polytrimethylene Ether Glycol (PO10G) Market Outlook, By Industry-Specific Channels (2024-2032) (\$MN)

115 Middle East & Africa Polytrimethylene Ether Glycol (PO11G) Market Outlook, By Application (2024-2032) (\$MN)

- 116 Middle East & Africa Polytrimethylene Ether Glycol (PO12G) Market Outlook, By Textiles & Apparel (2024-2032) (\$MN)
- 117 Middle East & Africa Polytrimethylene Ether Glycol (PO13G) Market Outlook, By Footwear (2024-2032) (\$MN)
- 118 Middle East & Africa Polytrimethylene Ether Glycol (PO14G) Market Outlook, By Coatings & Sealants (2024-2032) (\$MN)
- 119 Middle East & Africa Polytrimethylene Ether Glycol (PO15G) Market Outlook, By 3D Printing (2024-2032) (\$MN)
- 120 Middle East & Africa Polytrimethylene Ether Glycol (PO16G) Market Outlook, By Other Applications (2024-2032) (\$MN)
- 121 Middle East & Africa Polytrimethylene Ether Glycol (PO17G) Market Outlook, By End User (2024-2032) (\$MN)
- 122 Middle East & Africa Polytrimethylene Ether Glycol (PO18G) Market Outlook, By Automotive (2024-2032) (\$MN)
- 123 Middle East & Africa Polytrimethylene Ether Glycol (PO19G) Market Outlook, By Industrial (2024-2032) (\$MN)
- 124 Middle East & Africa Polytrimethylene Ether Glycol (PO20G) Market Outlook, By Cosmetics (2024-2032) (\$MN)
- 125 Middle East & Africa Polytrimethylene Ether Glycol (PO21G) Market Outlook, By Consumer Goods (2024-2032) (\$MN)
- 126 Middle East & Africa Polytrimethylene Ether Glycol (PO22G) Market Outlook, By Other End Users (2024-2032) (\$MN)

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