

## An Overview of the Global Market for Polyester Polyols

IAL Consultants has published the third edition of its report on the markets for aromatic and aliphatic polyester polyols. This new study updates the information included in the previous study published in 2007. Data in this report has been revised through a programme of interviews throughout the industry during the last quarter of 2012 and the first quarter of 2013.

The report contains data on the consumption of both aliphatic and aromatic polyester polyols in 2012 and forecast consumption for 2017 split by the three major geographic regions (Americas, EMEA and Asia-Pacific). In this report, the data for aromatic polyester polyols is split into the following end-use categories: flexible-faced panels, rigid-faced panels, slabstock/bunstock, rigid spray foam, refrigeration, OCF aerosol sprays, pipe-in-pipe insulation, coatings, elastomers, adhesives and sealants. According to the study, the demand for aromatic polyester polyols has continued to grow in recent years despite the challenging economic conditions. The total market for aromatic polyester polyols was estimated at 584,190 t in 2012. Western Europe and North America represent the largest markets with 36 % and 39 % share of the global markets, respectively. These markets are driven by the increasing demand for high quality thermal insulation, in particular flexible-faced PIR panels, in an effort to improve the energy efficiency of the new and existing building stock. The global market is expected to grow by an average 4.4 % annually over the next five years with fastest growth taking place in Asia, above all China.

The market for aliphatic polyester polyols is divided into the following end-use categories: flexible polyester slabstock foam, elastomers, paints and coatings, adhesives and sealants. The market for aliphatic polyester polyols is dominated by the huge demand from Chinese end users for elastomer and coating applications. Footwear elastomers, primarily microcellular soles, represent the largest end-use application for aliphatic polyester polyols. The markets in Europe and North America are more stagnant with most growth expected to come from the adhesive applications over the next five years. The total market was estimated at 1,519,970 t in 2012, with China accounting for a reported 53 % of the total demand. The market is expected to grow by 8.0 % annually over the next five years, with most growth present in Asia.

The report "An Overview of the Global Market for Polyester Polyols" is available from IAL Consultants, priced EUR 3,500 for the two volumes or EUR 2,000 for a single volume.

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