

**Polyols Market by Type (Polyether Polyols, Polyester Polyols), Application (Flexible Polyurethane Foam, Rigid Polyurethane Foam, CASE), End-use Industry (Building & Construction, Furnishing, Automotive, Electronics), and Region - Global Forecast to 2030**

Market Report | 2025-09-02 | 298 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The market for polyols was valued at USD 16.01 billion in 2024 and is projected to reach USD 21.59 billion by 2030, growing at a CAGR of 5.1% during the forecast period. Demand for polyols is driven by their widespread use in producing polyurethane-based products, which are essential materials across many industries. Polyols are utilized in construction to create rigid foam insulation that supports energy-efficient buildings. In the automotive and furniture sectors, flexible polyurethane foams made from polyols enhance comfort and durability while keeping products lightweight. The rising packaging industry also boosts demand for polyols, as they are used to produce cushioning and protective materials. Additionally, increasing interest in sustainable and high-performance materials is driving the development of bio-based polyols. Overall, the versatility of polyols improves product performance, reduces environmental impact, and increases demand in both established and emerging markets.

<https://www.marketsandmarkets.com/Images/polyols-market-Overview.webp>

By type, polyether polyols segment to record highest CAGR during forecast period

By type, polyether polyols accounted for the highest CAGR for the forecast period due to their growing use in a wide range of applications. Polyether polyols are known for their low viscosity, quick reaction with isocyanates, and excellent compatibility with various additives. Because of these qualities, they are commonly used in both flexible and rigid foams. These foams are utilized in automotive seats, bedding, furniture, insulation materials, and packaging markets, all of which are experiencing increased

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

demand in both developed and emerging markets.

The strong growth of this segment is further driven by increasing focus on energy efficiency and lightweight materials, especially in construction and automotive markets. Polyether polyols offer better hydrolytic stability and processing advantages over polyester polyols. Polyether polyols are also expected to gain market share over polyester polyols due to the emergence of bio-based options, creating new opportunities for growth.

Polyether polyols now dominate both in volume and value because of their ability to ensure consistent production, impressive performance, and a wide variety of formulation options. As industries increasingly prioritize performance, cost-efficiency, and environmental compliance, the polyether polyols segment is expected to remain at the forefront until the end of the forecast period.

By end-use industry, building & construction segment to exhibit highest CAGR during forecast period

The building and construction segment experienced the highest CAGR throughout the forecast period for end-use industries, driven by the rapidly growing demand for energy-efficient materials and sustainable building solutions. Polyols are a key raw material for rigid polyurethane foams, which are extensively used in insulation applications such as wall panels, roofs, floor insulation, and pipe insulation. Additionally, rapid urbanization, infrastructure development, and regulatory requirements for energy conservation have both directly and indirectly increased demand for high-performance insulation materials, especially in developing economies, notably in the Asia Pacific and Middle East regions. Polyurethane insulation made from polyols offers all these performance features, including thermal resistance, moisture barriers, and stability. Furthermore, awareness of green-building certifications and environmental standards is fueling continued adoption of polyurethane construction materials. As construction practices evolve to emphasize longer service life and environmental performance, polyols are essential in developing new materials that meet these modern requirements.

The combination of regulatory support, rising construction activity, and a growing focus on developing sustainable infrastructure will continue to drive the growth of the Building & Construction segment of the polyols market throughout the forecast period.

Asia Pacific to account for highest CAGR during forecast period

By region, Asia Pacific is projected to experience the highest CAGR over the forecast period due to rapid industrialization and urbanization, along with rapidly growing end-use industries such as construction, automotive, furniture, and packaging. Specifically, countries like China, India, South Korea, and Southeast Asian nations are growing quickly. This has led to increased infrastructure development, higher disposable incomes, and greater customers' demand for durable goods, consequently raising the demand for polyol products.

The construction industry in Asia Pacific has grown substantially due to government investments in residential, commercial, and industrial infrastructure, leading to higher consumption of polyol, a key ingredient in rigid polyurethane foams used for thermal insulation. Furthermore, the expanding automotive and furniture sectors have boosted the demand for flexible polyurethane foams used in seating, bedding, and other interior components.

Asia Pacific also has a strong manufacturing base, a dependable source of inexpensive raw materials, and greater government support for industrial development. Additionally, domestic and international companies are quickly expanding their production capacities through significantly increased R&D spending or enlarging their manufacturing capabilities to meet customer demand. All of these factors will help Asia Pacific become the largest regional market for polyols globally and the fastest growing during the forecast period.

-□By Company Type: Tier 1: 45%, Tier 2: 22%, and Tier 3: 33%

-□By Designation: C Level: 50%, Director Level: 25%, and Others: 25%

-□By Region: North America: 45%, Europe: 20%, Asia Pacific: 20%, Middle East & Africa: 10%, and South America: 5%.

Companies Covered

DOW (US), Covestro AG (Germany), BASF SE (Germany), Huntsman International LLC (US), Shell (UK), Stepan Company (US), Wanhua Chemical Group (China), Repsol S.A. (Spain), PCC SE (Germany), and LANXESS (Germany) are some key players in polyols

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

market.

## Research Coverage

The market study examines the polyols market across various segments. It aims to estimate the market size and growth potential in different segments based on type, application, end-use industry, and region. The study also includes an in-depth competitive analysis of key market players, their company profiles, observations related to their products and business offerings, recent developments, and key growth strategies they have adopted to strengthen their position in the polyols market.

## Key Benefits of Buying Report

The report is designed to help market leaders and new entrants estimate the revenue figures of the entire polyols market and its segments and sub-segments. It aims to assist stakeholders in understanding the competitive landscape, gaining insights to strengthen their business positions, and developing effective go-to-market strategies. Additionally, the report provides stakeholders with insights into the market's current trends, including key drivers, challenges, and opportunities.

The report provides insights into the following points:

- Analysis of key drivers (Growth of packaging industry and automotive light-weighting trend), restraints (Complexity in recycling polyurethane products and stringent environmental regulations for polyurethane foam), opportunities (Growing adoption of bio-based polyols and high-purity polyols for medical grade applications), and challenges (Eco-friendly alternatives) influencing the growth of the polyols market.
  - Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and new product & service launches in the polyols market
  - Market Development: Comprehensive information about profitable markets - the report analyses the polyols market across varied regions
  - Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the polyols market
  - Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like as DOW (US), Covestro AG (Germany), BASF SE (Germany), Huntsman International LLC (US), Shell (UK), Stepan Company (US), Wanhua Chemical Group (China), Repsol S.A. (Spain), PCC SE (Germany), LANXESS (Germany), and others in the polyols market.
- The report also helps stakeholders understand the pulse of the polyols market and provides them with information on key market drivers, restraints, challenges, and opportunities.

## Table of Contents:

1	INTRODUCTION	27
1.1	STUDY OBJECTIVES	27
1.2	MARKET DEFINITION	27
1.3	STUDY SCOPE	28
1.3.1	MARKETS COVERED AND REGIONAL SCOPE	28
1.3.2	INCLUSIONS AND EXCLUSIONS	28
1.3.3	YEARS CONSIDERED	29
1.3.4	CURRENCY CONSIDERED	29
1.3.5	UNIT CONSIDERED	29
1.4	LIMITATIONS	30
1.5	STAKEHOLDERS	30
1.6	SUMMARY OF CHANGES	30
2	RESEARCH METHODOLOGY	31
2.1	RESEARCH DATA	31
2.1.1	SECONDARY DATA	32
2.1.1.1	Key data from secondary sources	32
2.1.1.2	List of secondary sources	32

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.1.2	PRIMARY DATA	33
2.1.2.1	Key primary participants	33
2.1.2.2	Key data from primary sources	33
2.1.2.3	Breakdown of interviews with experts	34
2.1.2.4	Key industry insights	34
2.2	MARKET SIZE ESTIMATION	35
2.2.1	TOP-DOWN APPROACH	35
2.2.2	BOTTOM-UP APPROACH	35
2.2.3	BASE NUMBER CALCULATION	36
2.2.4	SUPPLY-SIDE ANALYSIS	36
2.3	GROWTH FORECAST	37
2.4	DATA TRIANGULATION	37
2.5	RESEARCH ASSUMPTIONS	38
2.6	FACTOR ANALYSIS	38
2.7	RESEARCH LIMITATIONS	39
2.8	RISK ASSESSMENT	39
3	EXECUTIVE SUMMARY	40
?		
4	PREMIUM INSIGHTS	44
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN POLYOLS MARKET	44
4.2	POLYOLS MARKET, BY TYPE	44
4.3	POLYOLS MARKET, BY APPLICATION	45
4.4	POLYOLS MARKET, BY END-USE INDUSTRY	45
4.5	ASIA PACIFIC POLYOLS MARKET, BY TYPE AND COUNTRY	46
4.6	POLYOLS MARKET, BY KEY COUNTRY	46
5	MARKET OVERVIEW	47
5.1	INTRODUCTION	47
5.2	MARKET DYNAMICS	48
5.2.1	DRIVERS	48
5.2.1.1	Expanding packaging industry	48
5.2.1.2	Increasing automobile lightweighting trend	49
5.2.1.3	Rising use of flexible PU in wearables and footwear	50
5.2.2	RESTRAINTS	50
5.2.2.1	Complexity in recycling polyurethane products	50
5.2.2.2	Stringent environmental regulations associated with polyurethane foam	51
5.2.3	OPPORTUNITIES	51
5.2.3.1	Growing adoption of bio-based polyols	51
5.2.3.2	Adoption of high-purity polyols for medical-grade applications	52
5.2.4	CHALLENGES	53
5.2.4.1	Shift toward eco-friendly alternatives	53
5.2.4.2	Cross-border compliance complexity related to CASE polyols	53
6	INDUSTRY TRENDS	54
6.1	TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS	54
6.2	PRICING ANALYSIS	55
6.2.1	AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY TYPE, 2024	55
6.2.2	AVERAGE SELLING PRICE TREND, BY REGION, 2021-2024	56

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.3	VALUE CHAIN ANALYSIS	57
6.4	ECOSYSTEM ANALYSIS	58
6.5	TECHNOLOGY ANALYSIS	59
6.5.1	KEY TECHNOLOGIES	60
6.5.1.1	Poly-esterification	60
6.5.1.2	Ring-opening polymerization (ROP)	60
6.5.2	COMPLEMENTARY TECHNOLOGIES	61
6.5.2.1	Blowing agent technology	61
6.5.2.2	Recycling and recovery technology	61
6.5.3	ADJACENT TECHNOLOGIES	62
6.5.3.1	CO <sub>2</sub> -based polyols	62
6.5.3.2	Smart foams and composites	63
6.6	IMPACT OF GEN AI ON POLYOLS MARKET	63
6.7	PATENT ANALYSIS	64
6.7.1	INTRODUCTION	64
6.7.2	APPROACH	64
6.7.3	TOP APPLICANTS	65
6.8	TRADE ANALYSIS	67
6.8.1	IMPORT SCENARIO (HS CODE 390950)	67
6.8.2	EXPORT SCENARIO (HS CODE 390950)	68
6.9	KEY CONFERENCES AND EVENTS, 2025-2026	69
6.10	REGULATORY LANDSCAPE	70
6.10.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	70
6.10.2	REGULATIONS RELATED TO POLYOLS	72
6.11	PORTER'S FIVE FORCES ANALYSIS	73
6.11.1	THREAT OF NEW ENTRANTS	74
6.11.2	THREAT OF SUBSTITUTES	74
6.11.3	BARGAINING POWER OF SUPPLIERS	74
6.11.4	BARGAINING POWER OF BUYERS	74
6.11.5	INTENSITY OF COMPETITIVE RIVALRY	75
6.12	KEY STAKEHOLDERS AND BUYING CRITERIA	75
6.12.1	KEY STAKEHOLDERS IN BUYING PROCESS	75
6.12.2	BUYING CRITERIA	76
6.13	CASE STUDY ANALYSIS	76
6.13.1	COVESTRO DEVELOPS SUSTAINABLE CAST ELASTOMER SOLUTION FOR OFFSHORE INDUSTRY USING CO <sub>2</sub> -BASED POLYOLS	76
6.13.2	HUNTSMAN TRANSFORMS PLASTIC WASTE INTO ENERGY-SAVING INSULATION THROUGH TEROL POLYESTER POLYOLS	77
6.13.3	BASF REDUCES INTERIOR CAR EMISSIONS WITH LOW-EMISSION LUPRANOL POLYETHER POLYOLS	77
6.14	MACROECONOMIC OUTLOOK	78
6.14.1	INTRODUCTION	78
6.14.2	GDP TRENDS AND FORECASTS	78
6.14.3	GLOBAL CONSTRUCTION TRENDS	79
6.14.4	AUTOMOBILE PRODUCTION CYCLES	80
6.15	INVESTMENT AND FUNDING SCENARIO	81
6.16	IMPACT OF 2025 US TARIFF ON POLYOLS MARKET	82
6.16.1	INTRODUCTION	82
6.16.2	KEY TARIFF RATES	82

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.16.3	PRICE IMPACT ANALYSIS	83
6.16.4	KEY IMPACT ON VARIOUS REGIONS	83
6.16.4.1	US	83
6.16.4.2	Europe	83
6.16.4.3	Asia Pacific	83
6.16.5	END-USE INDUSTRY IMPACT	84
7	POLYOLS MARKET, BY TYPE	85
7.1	INTRODUCTION	86
7.2	POLYETHER POLYOLS	88
7.2.1	HIGH REACTIVITY, VERSATILE MOLECULAR DESIGN, AND COMPATIBILITY WITH VARIOUS ISOCYANATES TO DRIVE DEMAND	88
7.3	POLYESTER POLYOLS	89
7.3.1	USE TO ENHANCE POLYURETHANE STRENGTH IN COATINGS, ELASTOMERS, AND FOAMS TO DRIVE MARKET	89
8	POLYOLS MARKET, BY APPLICATION	90
8.1	INTRODUCTION	91
8.2	FLEXIBLE POLYURETHANE FOAM	92
8.2.1	INCREASED USE IN CUSHIONING AND COMFORT APPLICATIONS TO DRIVE MARKET	92
8.3	RIGID POLYURETHANE FOAMS	93
8.3.1	USE IN HIGH-PERFORMANCE INSULATION SYSTEMS TO PROPEL MARKET	93
8.4	COATINGS, ADHESIVES, SEALANTS, AND ELASTOMERS (CASE)	93
8.4.1	ABILITY TO OFFER HIGH MECHANICAL PERFORMANCE, CHEMICAL RESISTANCE, AND ENVIRONMENTAL DURABILITY TO DRIVE MARKET	93
9	POLYOLS MARKET, BY END-USE INDUSTRY	95
9.1	INTRODUCTION	96
9.2	BUILDING & CONSTRUCTION	98
9.2.1	USE TO POWER HIGH-PERFORMANCE INSULATION SYSTEMS IN MODERN BUILDING AND CONSTRUCTION PROJECTS TO PROPEL MARKET	98
9.3	AUTOMOTIVE	98
9.3.1	ABILITY TO SUPPORT LIGHTWEIGHT, DURABLE, AND LOW-EMISSION SOLUTIONS IN AUTOMOBILE APPLICATIONS TO DRIVE DEMAND	98
9.4	FURNISHING	99
9.4.1	ENHANCEMENT OF COMFORT, DURABILITY, AND SUSTAINABILITY IN MODERN FURNISHING APPLICATIONS TO FUEL MARKET GROWTH	99
9.5	PACKAGING	99
9.5.1	ABILITY TO OFFER HIGH-PERFORMANCE, INSULATED, AND SUSTAINABLE SOLUTIONS IN ADVANCED PACKAGING APPLICATIONS TO DRIVE MARKET	99
9.6	ELECTRONICS	100
9.6.1	ADOPTION TO DELIVER ESSENTIAL PROTECTION AND INSULATION IN ADVANCED ELECTRONIC COMPONENTS TO BOOST MARKET	100
9.7	OTHER END-USE INDUSTRIES	100
10	POLYOLS MARKET, BY REGION	101
10.1	INTRODUCTION	102
10.2	ASIA PACIFIC	104
10.2.1	CHINA	110
10.2.1.1	New Energy Vehicle (NEV) growth, rapid urbanization, and expanding electronics industry to propel demand	110
10.2.2	INDIA	112
10.2.2.1	Rising infrastructure development investments, EV adoption, and booming furniture industry to drive demand	112

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

10.2.3	JAPAN	114
10.2.3.1	Growing automotive and furniture industries to fuel demand	114
10.2.4	SOUTH KOREA	116
10.2.4.1	Expanding EV industry and housing development to propel demand	116
10.2.5	THAILAND	119
10.2.5.1	Booming construction, automotive, and electronics industries to drive market	119
10.2.6	INDONESIA	121
10.2.6.1	Smart city development and industrial expansion to drive demand	121
10.2.7	REST OF ASIA PACIFIC	123
10.3	EUROPE	125
10.3.1	GERMANY	131
10.3.1.1	Booming automotive, construction, and electronics industries to fuel demand	131
10.3.2	UK	133
10.3.2.1	Robust infrastructure development and advancements in automotive and electronics industries to drive demand	133
10.3.3	FRANCE	135
10.3.3.1	Rising urbanization and industrial resurgence to drive demand	135
10.3.4	ITALY	137
10.3.4.1	Infrastructure upgrades, industrial revival, and export growth to propel demand	137
10.3.5	RUSSIA	140
10.3.5.1	Accelerating housing targets and automotive sector rebound to fuel demand	140
10.3.6	TURKEY	142
10.3.6.1	Surging home sales, vehicle production, and furniture exports to fuel demand	142
10.3.7	REST OF EUROPE	144
10.4	NORTH AMERICA	146
10.4.1	US	151
10.4.1.1	Surging construction activities, EV adoption, and furniture demand to drive market	151
10.4.2	CANADA	153
10.4.2.1	Booming construction industry and EV investments to fuel demand	153
10.4.3	MEXICO	155
10.4.3.1	Increasing automobile production and electronics trade to drive demand	155
10.5	MIDDLE EAST & AFRICA	157
10.5.1	GCC COUNTRIES	162
10.5.1.1	Saudi Arabia	165
10.5.1.1.1	Rising infrastructure development and automotive market to propel demand	165
10.5.1.2	UAE	167
10.5.1.2.1	Expanding real estate sector and EV infrastructure growth to drive demand	167
10.5.1.3	Rest of GCC Countries	169
10.5.2	SOUTH AFRICA	171
10.5.2.1	Expanding real estate sector and increasing automobile production to fuel demand	171
10.5.3	REST OF MIDDLE EAST & AFRICA	174
10.6	SOUTH AMERICA	176
10.6.1	BRAZIL	180

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.6.1.1	Surging construction and EV manufacturing investments to drive demand	180
10.6.2	ARGENTINA	183
10.6.2.1	Residential expansion and EV adoption accelerating material needs to drive demand	183
10.6.3	REST OF SOUTH AMERICA	185
11	COMPETITIVE LANDSCAPE	188
11.1	OVERVIEW	188
11.2	KEY PLAYER STRATEGIES/RIGHT TO WIN	188
11.3	REVENUE ANALYSIS	191
11.4	MARKET SHARE ANALYSIS	191
11.5	COMPANY VALUATION AND FINANCIAL METRICS	194
11.6	BRAND/PRODUCT COMPARISON	195
11.7	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	196
11.7.1	STARS	196
11.7.2	EMERGING LEADERS	196
11.7.3	PERVASIVE PLAYERS	197
11.7.4	PARTICIPANTS	197
11.7.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	198
11.7.5.1	Company footprint	198
11.7.5.2	Region footprint	198
11.7.5.3	Type footprint	199
11.7.5.4	Application footprint	199
11.7.5.5	End-use industry footprint	200
11.8	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	200
11.8.1	PROGRESSIVE COMPANIES	200
11.8.2	RESPONSIVE COMPANIES	200
11.8.3	DYNAMIC COMPANIES	201
11.8.4	STARTING BLOCKS	201
11.8.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	202
11.8.5.1	Detailed list of key startups/SMEs	202
11.8.5.2	Competitive benchmarking of key startups/SMEs	203
11.9	COMPETITIVE SCENARIO	205
11.9.1	PRODUCT LAUNCHES	205
11.9.2	DEALS	208
11.9.3	EXPANSIONS	210
12	COMPANY PROFILES	214
12.1	KEY PLAYERS	214
12.1.1	DOW	214
12.1.1.1	Business overview	214
12.1.1.2	Products/Solutions/Services offered	215
12.1.1.3	Recent developments	216
12.1.1.3.1	Product launches	216
12.1.1.3.2	Expansions	217
12.1.1.3.3	Others	217
12.1.1.4	MnM view	217
12.1.1.4.1	Key strengths/Right to win	217
12.1.1.4.2	Strategic choices	218
12.1.1.4.3	Weaknesses/Competitive threats	218



12.1.2	COVESTRO AG	219
12.1.2.1	Business overview	219
12.1.2.2	Products/Solutions/Services offered	220
12.1.2.3	Recent developments	221
12.1.2.3.1	Product launches	221
12.1.2.3.2	Deals	222
12.1.2.3.3	Others	223
12.1.2.4	MnM view	223
12.1.2.4.1	Key strengths/Right to win	223
12.1.2.4.2	Strategic choices	223
12.1.2.4.3	Weaknesses/Competitive threats	224
12.1.3	BASF SE	225
12.1.3.1	Business overview	225
12.1.3.2	Products/Solutions/Services offered	226
12.1.3.3	Recent developments	227
12.1.3.3.1	Product launches	227
12.1.3.3.2	Deals	227
12.1.3.3.3	Expansions	228
?		
12.1.3.4	MnM view	228
12.1.3.4.1	Key strengths/Right to win	228
12.1.3.4.2	Strategic choices	228
12.1.3.4.3	Weaknesses/Competitive threats	229
12.1.4	HUNTSMAN INTERNATIONAL LLC	230
12.1.4.1	Business overview	230
12.1.4.2	Products/Solutions/Services offered	231
12.1.4.3	Recent developments	232
12.1.4.3.1	Deals	232
12.1.4.3.2	Expansions	232
12.1.4.4	MnM view	233
12.1.4.4.1	Key strengths/Right to win	233
12.1.4.4.2	Strategic choices	233
12.1.4.4.3	Weaknesses/Competitive threats	233
12.1.5	SHELL	234
12.1.5.1	Business overview	234
12.1.5.2	Products/Solutions/Services offered	235
12.1.5.3	Recent developments	236
12.1.5.3.1	Deals	236
12.1.5.3.2	Expansions	236
12.1.5.4	MnM view	237
12.1.5.4.1	Key strengths/Right to win	237
12.1.5.4.2	Strategic choices	237
12.1.5.4.3	Weaknesses/Competitive threats	237
12.1.6	STEPAN COMPANY	238
12.1.6.1	Business overview	238
12.1.6.2	Products/Solutions/Services offered	239
12.1.6.3	Recent developments	240

12.1.6.3.1	Product launches	240
12.1.6.3.2	Deals	241
12.1.6.3.3	Expansions	241
12.1.6.4	MnM view	242
12.1.7	WANHUA CHEMICAL GROUP	243
12.1.7.1	Business overview	243
12.1.7.2	Products/Solutions/Services offered	244
12.1.7.3	Recent developments	245
12.1.7.3.1	Product launches	245
12.1.7.3.2	Deals	246
12.1.7.3.3	Expansions	246
12.1.7.4	MnM view	247
?		
12.1.8	REPSOL S.A.	248
12.1.8.1	Business overview	248
12.1.8.2	Products/Solutions/Services offered	249
12.1.8.3	Recent developments	250
12.1.8.3.1	Product launches	250
12.1.8.3.2	Deals	251
12.1.8.3.3	Expansions	251
12.1.8.4	MnM view	252
12.1.9	PCC SE	253
12.1.9.1	Business overview	253
12.1.9.2	Products/Solutions/Services offered	254
12.1.9.3	Recent developments	255
12.1.9.3.1	Product launches	255
12.1.9.3.2	Deals	256
12.1.9.3.3	Expansions	256
12.1.9.4	MnM view	257
12.1.10	LANXESS	258
12.1.10.1	Business overview	258
12.1.10.2	Products/Solutions/Services offered	259
12.1.10.3	Recent developments	260
12.1.10.3.1	Product launches	260
12.1.10.3.2	Expansions	261
12.1.10.3.3	Others	261
12.1.10.4	MnM view	262
12.2	OTHER PLAYERS	263
12.2.1	ZIBO DEXIN LIANBANG CHEMICAL INDUSTRY CO., LTD.	263
12.2.2	SHANDONG LONGHUA NEW MATERIAL CO., LTD.	264
12.2.3	ZHEJIANG HUAFON NEW MATERIALS CORP., LTD.	265
12.2.4	SHAKUN INDUSTRIES	266
12.2.5	INTERPUR CHEMICALS	267
12.2.6	MANALI PETROCHEMICALS LIMITED	268
12.2.7	POLYOLS & POLYMERS PVT LTD.	269
12.2.8	KURARAY CO., LTD.	270
12.2.9	SUMITOMO BAKELITE HIGH PERFORMANCE PLASTICS (SBHPP)	271

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.2.10	ERCA ADVANCED POLYMER SOLUTIONS	272
12.2.11	SINOCHM HOLDINGS CORPORATION LTD.	273
12.2.12	DAICEL CORPORATION	274
12.2.13	EMERY OLEOCHEMICALS	275
12.2.14	SOLVAY	276
12.2.15	PERSTORP	277
12.2.16	ARAMCO	278
?		
12.2.17	TOSOH CORPORATION	279
12.2.18	ARKEMA	280
12.2.19	PLUSKIM	281
12.2.20	PURINOVA SP. Z O.O.	282
12.2.21	PTT GLOBAL CHEMICAL PUBLIC COMPANY LIMITED	283
13	ADJACENT AND RELATED MARKET	284
13.1	INTRODUCTION	284
13.2	LIMITATIONS	284
13.2.1	POLYURETHANE FOAM MARKET	284
13.2.1.1	Market definition	284
13.2.1.2	Polyurethane foam market, by type	284
13.2.1.3	Polyurethane foam market, by end-use industry	286
13.2.1.4	Polyurethane foam market, by region	287
14	APPENDIX	290
14.1	DISCUSSION GUIDE	290
14.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	294
14.3	CUSTOMIZATION OPTIONS	296
14.4	RELATED REPORTS	296
14.5	AUTHOR DETAILS	297

**Polyols Market by Type (Polyether Polyols, Polyester Polyols), Application (Flexible Polyurethane Foam, Rigid Polyurethane Foam, CASE), End-use Industry (Building & Construction, Furnishing, Automotive, Electronics), and Region - Global Forecast to 2030**

Market Report | 2025-09-02 | 298 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2026-02-08
		Signature	<div></div>