Propylene Oxide Market by Production Process (Chlorohydrin Process, Styrene Monomer Process), Application (Polyether Polyols, Propylene Glycol), End-use Industry (Automotive, Building & Construction), and Region - Global Forecast to 2030

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Report description:

The propylene oxide market is projected to grow from USD 14.89 billion in 2025 to USD 18.88 billion by 2030, at a CAGR of 4.9% during the forecast period. The prime driving force in the propylene oxide market, given the substance's vital use in the production of polyurethane in the form of polyether polyols in rigid and flexible foams, is propylene oxide's use in the production of foams, which directly stimulates the volume of propylene oxide production. The increasing rate of urbanization in the world, including the Asian, North American, and European markets, is increasing the use of lightweight building structure material, in addition to efficient thermal insulation. The principal driving force is often regarded as the structural pull provided by derivatives of polyurethane.

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"By application, the polyether polyols segment is estimated to account for the largest share, in terms of volume, during the forecast period."
The polyether polyols market is expected to account for the largest volume share during the forecasted period due to its wide usage in volume-driven end-use applications and its highest consumption of propylene oxide. Rigid and flexible polyurethane foams, which are widely used in building insulation, car seats, and interior trims, furniture, bedding, and packaging, respectively, are mainly produced using polyether polyols. The demand for polyether polyol foam is being largely stimulated by the rising demand due to the fast-growing number of construction projects, the increasing demand for energy-efficient buildings, and the rising production levels of automobiles, particularly lightweight and electric cars. Additionally, polyether polyols offer an edge over alternatives because of their superior properties, including flexibility, strength, and ease of processing. The polyether polyols

continuously hold the highest volume market due to large and continuous production, which in turn supports high use levels of propylene oxide.

"By end-use industry, the automotive segment is estimated to be the fastest-growing segment of the propylene oxide market during the forecast period."
The automotive application segment of the propylene oxide market is expected to grow at the most prominent pace through the forecast period due to the growing use of lightweight and high-performance materials in the car industry, propylene oxide-based polyether polyols are primarily used to make polyurethane foams intended for applications related to the creation of seating, head rests, arm rests, and curtain and trunk linings with a focus on promoting passenger comfort, safety, and noise reduction capabilities within a vehicle. Further driving the demand is the rampant shift toward the use of electric cars, with car manufacturers exemplifying the use of lightweight materials to boost the efficiency and range of electric cars. The rising use of polyurethane parts is also gaining impetus with the growing production volumes of autos within developing countries and more stringent pollution and fuel economy norms. The propylene oxide market is also being driven by the marked growth trajectory illustrated by the car interior sector, with more focus on passenger comfort.
"By production process, the styrene monomer process segment is estimated to hold the largest share, in terms of volume, during the forecast period."
The styrene monomer process is estimated to account for the largest volume share within the propylene oxide market during the forecast period due to its strong link with styrene manufacture and its large worldwide capacity. By aiding the simultaneous manufacture of propylene oxide and styrene monomer, the SM process allows companies to leverage economies of scale, high efficiency, and optimal costs. Large players often resort to this process, which relies on the well-known demand for styrene from various consumer products, construction, and packaging sectors. Assuming the large capital expenditure requirements involved with upgrading or changing processes, most old facilities have yet to shift from the styrene monomer process. To its credit, the process holds large-scale volumes within collective propylene oxide manufacture due to its well-proven reliability, capabilities, and matching demand within the styrene segment.

Profile break-up of primary participants for the report:
- By Company Type: Tier 1 - 30%, Tier 2 - 35%, and Tier 3 - 35%
- By Designation: C-level Executives - 30%, Directors - 60%, and Others - 10%
- By Region: North America - 30%, Asia Pacific - 15%, Europe - 40%, Middle East & Africa - 10%, and South America - 5%

Dow (US), LyondellBasell Industries Holdings B.V. (Netherlands), Shell (Netherlands), Indorama Ventures Public Company Limited (Thailand), and SABIC (Saudi Arabia) are among the key players in the propylene oxide market. These players have adopted various strategies, including agreements, joint ventures, and expansions, to increase their market share and business revenue.
Research Coverage
The report defines segments and projects the size of the propylene oxide market based on production process, application, end-use industry, and region. It strategically profiles the key players and comprehensively analyzes their market share and core competencies. It also tracks and analyzes competitive developments, such as expansions, agreements, and acquisitions undertaken by them in the market.
Reasons to Buy the Report
The report is expected to help the market leaders/new entrants by providing them with the closest approximations of revenue numbers of the propylene oxide market and its segments. This report is also expected to help stakeholders gain a deeper understanding of the market's competitive landscape, acquire valuable insights to enhance their business positions, and develop effective go-to-market strategies. It also enables stakeholders to understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:
- Analysis of critical drivers (rising demand for polyether polyols for the production of polyurethanes, growing demand from other

end use industries), restraints (health hazard classification and toxic nature of propylene oxide, occupational safety and compliance constraints), opportunities (development and adoption of cleaner production technologies, expanding opportunities in developing markets, emerging applications in healthcare industry), and challenges (price volatility of raw materials, use of bio-based feedstock for polyurethane foam instead of petroleum) influencing the growth of the propylene oxide market

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities in the propylene oxide market

- Market Development: Comprehensive information about lucrative markets: the report analyzes the propylene oxide market across varied regions

- Market Diversification: Exhaustive information about new products, various types, untapped geographies, recent developments, and investments in the propylene oxide market

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Dow (US), LyondellBasell Industries Holdings B.V. (Netherlands), Shell (Netherlands), Indorama Ventures Public Company Limited (Thailand), SABIC (Saudi Arabia), and others are the key players in the propylene oxide market

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