

AN OVERVIEW OF THE GLOBAL MARKET FOR ALIPHATIC POLYESTER POLYOLS

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IAL Consultants is pleased to announce the publication of its latest report for the polyurethane industry, analysing the consumption of adipate-based, aliphatic polyester polyols, within the major end-use markets across the world. Figures are based upon 1998 production of polyurethane products and associated polyester polyol consumption.

Total global production capacity of these polyester polyols is reported to be in excess of 650,000 tonnes, accounting for some 20% of world's total polyurethane polyol capacity, which is estimated to be 3.25 million tonnes.

Geographical coverage of this report includes data for production and consumption in the following major markets:

- **Western Europe**
- **Central & Eastern Europe**
- **North America**
- **South America**
- **Asia Pacific (inc. Japan & China)**
- **Middle East & Africa**

This report reviews the consumption of polyester polyols by the following major end-use markets:

- **PU Flexible Foam - Slabstock and Moulded**
- **PU Elastomers - Solid Microcellular and TPUs**
- **PU Coatings**
- **PU Adhesives & Sealants**
- **Synthetic Leather**

Published figures and industry estimates for production of end-use products are given where available, in order to substantiate market figures for polyol demand.

Major end-users are listed and when known, figures for their estimated production levels and associated polyester polyol consumption are given.

Market Trends and Influences

- Europe has the highest consumption of polyester polyols in the production of flexible foam products, both slabstock and moulded, due to their extensive use in the automotive industry
- There is increasing interest in production of polyester slabstock from companies in the Middle East and Africa, as well as in South America, where it is considered to be a premium product compared to standard polyether foams
- The adhesives, sealants, paints and coatings industries are largely supplied by systems houses, some of whom have an in-house supply of polyester polyols
- Consumption of polyester polyols in the manufacture of synthetic leather is dominated by Asian companies, mainly based in Taiwan and China
- Polyurethane soling systems for the footwear industry remain an important market for polyester polyols in Western Europe. A considerable volume is exported, especially to the footwear industry in Asia. However, there is growing competition from polyether polyols as well as non-polyurethane materials.

Brief technical and commercial information is provided within the report for each end-use market. A directory listing the main raw material producers and formulators of polyester polyols and systems is also included.

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