

Polyurethane Market in the US

US Industry Study with Forecasts for 2020 & 2025

Study #3463 | November 2016 | \$4700



Expansion in the polyurethane resin market will be driven by healthy growth in construction spending, spurring demand for polyurethane building insulation, coatings, adhesives and sealants. Flexible and rigid polyurethane foams will remain the largest product segments, each accounting for more than 30 percent of all polyurethane demand in 2020. Sealants will present the best growth prospects for polyurethanes through the forecast period, supported by continued strength in the construction market and increased usage in automotive applications.

Bedding segment revitalized by memory foam mattresses

Moderating advances for flexible polyurethane will be spurred by continued strength in the household products market, where demand in the mature bedding segment has been revived by the success of viscoelastic (memory) foam. Further gains will be supported by carpet and flooring applications, where polyurethane is utilized as padding. Gains in this market will be boosted by growing expenditures in residential construction. Further gains will be constrained by maturity in key markets including furniture and textiles, both of which are subject to strong import competition.

Rigid polyurethane holds growth in insulation applications

Demand in insulation will be supported by updated regulations that require better and more effective usage

of insulation, especially around ducts and the building envelope. Increased use per structure and upgrades of insulation for existing buildings will also aid rigid foam growth.

Polyurethanes find use in many applications

Other polyurethane uses include adhesives, elastomers, coatings, sealants, and other applications such as binders and composites. Gains in coatings will be supported by demand from the construction market, where wood and concrete coatings will outperform other coating types. In addition, innovation in waterborne polyurethane dispersions will further stimulate demand in coatings as well as adhesives. Sealants growth will be fueled by demand from construction applications such as joints, glass insulation, and air infiltration.

Study coverage

This study analyzes the US market for polyurethane. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by raw material (polyols, diisocyanates, additives and other), product (flexible foam, rigid foam, coatings, adhesives and sealants, elastomers, other) and market (construction, household products, transportation equipment, packaging, other). The study also considers key market environment factors, assesses industry structure and evaluates company market share.

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Flexible Foam

Flexible polyurethane foams account for approximately 20 percent annually to of all polyurethane bedding, a formerly success of viscoelastic and flooring market its effectiveness applications in packaging include maturity in markets such as furniture and textiles, as well increased imports of furniture and components from Asia (e.g., China) and Latin America (e.g., Mexico).

Flexible polyurethane foams are among the most efficient cushioning materials available. They consist of open cells formed by the isocyanate and simultaneous expansion of an isocyanate and a hydroxyl compound. Upon impact, the air contained in the open cell is expanded rapidly, adding to the cushioning properties of the material. The material is available in sheet form in a variety of densities depending on intended use. Sheets can subsequently be machined easily and at low costs make conformal shapes to fit specific products.

Household products and transportation equipment will together count for almost all of flexible polyurethane foam used in 2020. Household product applications will be stimulated by the advantages of flexible foam mattresses and growth in carpet and flooring applications, the latter being boosted by rising construction activity. Packaging applications will be buoyed by solid growth in plastic packaging shipments. Slower advances in transportation markets are anticipated due to trends toward thinner, more lightweight foams in motor vehicles, and market maturity.

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TABLE V-2

POLYURETHANE FOR CONSTRUCTION MARKETS BY APPLICATION (million pounds)

Item	2005	2010	2015	2020	2025
Construction Expenditures (bil 2009\$)					
lb PUR/000\$ expend					
PUR Construction Demand					
Insulation:					
Building					
Tanks & Pipes					
Wood Bonding					
Coatings:					
Wood Coatings					
Concrete Coatings					
Metal & Other Coatings					
Infiltration Barriers					
Other					

Source: The Freedonia Group

TABLE IV-1

POLYURETHANE DEMAND BY PRODUCT (million pounds)

Item	2005	2010	2015	2020	2025
Gross Domestic Product (bil 2009\$)					
lb PUR/000\$ GDP					
Polyurethane Demand					
Flexible Foam					
Rigid Foam					
Coatings, Adhesives, & Sealants					
Elastomers					
Other					
\$/lb					
Polyurethane Demand (mil \$)					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Plastic Foams

US demand for plastic foams is forecast to grow 2.3 percent per annum to 8.8 billion pounds in 2020, valued at \$25.2 billion. The construction sector is projected to lead growth prospects, while packaging will remain the leading outlet through 2020, accounting for nearly one-third of total volume. This study assesses the 7.9 billion pound US market for plastic foams, offering forecasts for 2020 and 2025 by market and product type (polyurethane, polystyrene, other). The study also examines the industry structure, evaluates market share and profiles US industry competitors.

#3405.....June 2016..... \$5300

World Thermoplastic Elastomers

World thermoplastic elastomer (TPE) demand will grow 5.2 percent annually to 6.7 million metric tons in 2019. Styrenic block copolymers will remain the largest segment, while thermoplastic vulcanizates and polyolefin elastomers will grow the fastest. China will remain the largest and fastest growing market. This study analyzes the 5.2 million metric ton world TPE industry, with forecasts for 2019 and 2024 by market and product for six world regions and 16 major countries. The study also evaluates company market share and profiles industry players.

#3326..... November 2015 \$6500

Insulation

US insulation demand will rise 6.6 percent annually through 2019 to \$10.3 billion. The residential market will grow the fastest, while the nonresidential market will recover from recent declines. Fiberglass and foamed plastic insulation will continue to claim the vast majority of the market, with foamed plastic growing slightly faster than fiberglass. This study analyzes the \$7.5 billion US insulation industry, with forecasts for 2019 and 2024 by product, market and US region. The study also evaluates company market share and profiles industry participants.

#3332..... September 2015..... \$5400

Adhesives & Sealants

US demand for adhesives and sealants is forecast to increase 2.8 percent per year to 6.4 billion pounds in 2019, valued at \$12.8 billion. Reactive adhesives and sealants will be the fastest growing types. The construction market will lead gains, while the manufacturing and assembly market will remain the largest segment. This study analyzes the 5.6 billion pound US adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

#3257..... February 2015 \$5400

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- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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