

Plasticizer Alcohols (C₄-C₁₃)

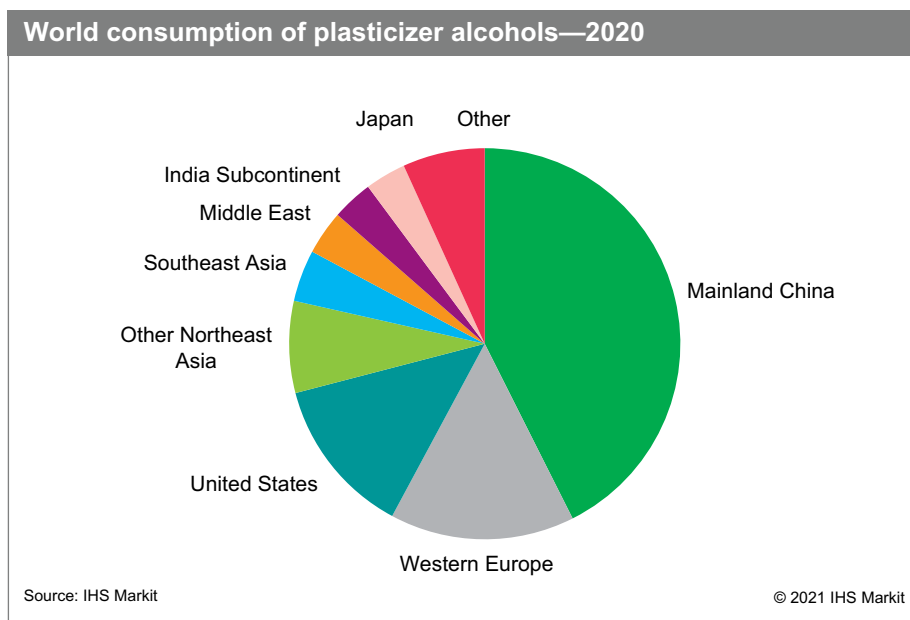
July 2021

Abstract

2-Ethylhexanol (2-EH) and n-butanol continue to account for most of plasticizer alcohol consumption, with a combined three-quarters of the global total. They are followed by isononyl alcohol and isobutanol. Consumption growth for both alcohols will continue during the next few years. Global demand of n-butanol is a result of large demand in n-butyl acrylate, acetate, and glycol ethers production. World demand for 2-EH is still dependent on DEHP plasticizer production and will continue to grow because of demand for nonphthalate DOTP plasticizer production

Demand for plasticizer alcohols in most downstream markets is influenced significantly by general economic conditions. As a result, demand for plasticizer alcohols largely follows the patterns of the leading world economies. The major end-use markets include construction/remodeling, automotive production, and original equipment manufacture (OEM).

The following chart shows world consumption of plasticizer alcohols:



In 2020, the COVID-19 pandemic led to declines in plasticizer alcohols use in such markets as construction and automotive. However, in general, some economies started to recover during the second half of 2020, and plasticizer alcohols demand also began to recover. Depending on the region, plasticizer alcohols consumption

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levels have already returned or will return to pre-COVID-19 pandemic levels during the next year or two, and experience growth thereafter.

Plasticizers are the largest end-use market for plasticizer alcohols, accounting for nearly half of world consumption in 2020. Plasticizers will remain the largest application; however, demand in nonplasticizer applications such as acrylate/methacrylate esters, acetate esters, and glycol ethers, will also grow depending on the regional markets. Plasticizers will remain the largest application; however, demand in plasticizers will grow less than demand for plasticizer alcohols in acrylate/methacrylate and acetate esters. Plasticizer-producing regions, such as the United States and Western Europe, are experiencing modest but limited growth rates, while Japan is expected to record a slight decrease for plasticizer consumption. Plasticizers consumed in regions such as the United States, Western Europe, and Japan will experience modest growth while the plasticizers market in mainland China will grow relatively well. World consumption of plasticizer alcohols for plasticizers is forecast to grow at an average annual rate of 3.2% during 2021–25, mainly because of stronger growth in mainland China and more modest growth in Western Europe and the United States.

Asia, Europe, and North America are the largest markets for plasticizer alcohols, accounting for nearly 95% of world demand in 2020.

Mainland Chinese consumption is projected to experience a 3.3% average annual growth in 2021–25. Demand for plasticizer alcohols in the United States and Europe is expected to grow at a modest rate. Consumption in Other Asia Pacific will also grow modestly but at higher rates than the United States and Europe.

Consumption of plasticizer alcohols, especially C₆–C₁₃ alcohols, depends greatly on demand for plasticizers and flexible PVC. Although some nonplasticizer applications are growing at faster rates, they represent a smaller portion of the consumption of most C₆–C₁₃ alcohols. Plasticizers account for 88% of mainland Chinese consumption of 2-EH, more than 50% of the US consumption of 2-EH, and over 21% in Western Europe; 2-EH consumption for plasticizers accounts for the majority in most other countries. Large volumes of C₉, C₁₀, and certain linear alcohols are also converted to plasticizers. Solvent/coating applications are the largest end use for C₄–C₅ alcohols.

Global demand for n-butanol is a result of large demand in n-butyl acrylate, acetate, and glycol ethers production. World demand for 2-EH is still dependent on DEHP production, which will continue to grow because of demand for nonphthalate DOTP plasticizer production. In some regions, including the United States, Asia, and Western Europe, 2-EH consumption is also dependent on the production of 2-ethylhexyl acrylate.

For more detailed information, see the table of contents, shown below.

IHS Markit's Chemical Economics Handbook – *Plasticizer Alcohols* is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Global summary;
regional coverage



Producers with
annual capacities
and plant sites



Production figures
and trends



Consumption and
forecasts by end use
application



Manufacturing
processes and
environmental issues



Trade – imports
and exports

Key benefits

IHS Markit's Chemical Economics Handbook – *Plasticizer Alcohols* has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade, and economics.

This report can help you

- Identify trends and driving forces influencing chemical markets
- Forecast and plan for future demand
- Understand the impact of competing materials
- Identify and evaluate potential customers and competitors
- Evaluate producers
- Track changing prices and trade movements
- Analyze the impact of feedstocks, regulations, and other factors on chemical profitability

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