

Polyurethane Foams

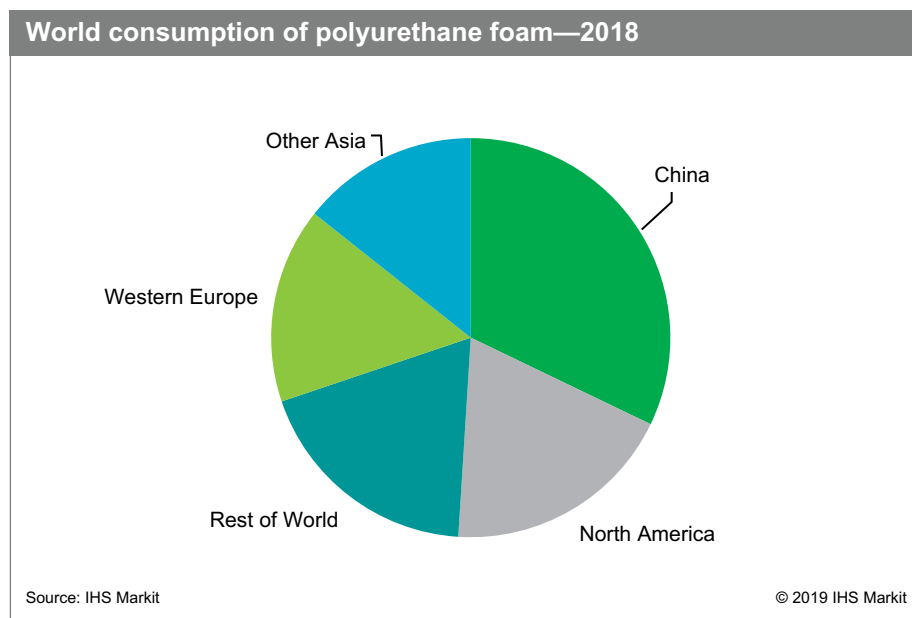
15 November 2019

Abstract

Global consumption of polyurethane foam will continue to grow steadily during 2018–24; with rigid foam consumption increasing only slightly faster than flexible foam.

Major drivers for consumption growth for flexible foam are production of beds and furniture, such as sofas and chairs, and automotive seats. Growth of rigid foam consumption is predominantly from insulation. Consumption for insulation will continue to grow as stricter energy efficiency improvements are required.

The following chart shows consumption of polyurethane foam by major region:



Among total polyurethane foams consumption, consumption of flexible foams is a 10–20% larger market than that of rigid foams. China and Other Asia account for almost half of global consumption of polyurethane foams in 2018.

This report provides an excellent insight into the global market for polyurethane foams with detailed breakdown of end-uses for both flexible polyurethane foams and rigid polyurethane foams. It has been compiled using primary industry research and brings together elements of other IHS Markit reports in the Chemical Economics Handbook (CEH) and Specialty Chemicals Update Program (SCUP) suite of polyurethane chains including di-isocyanates and polyisocyanates, polyether polyols, polyester polyols and polyurethane elastomers.

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

Contacts

Koon-Ling Ring • Koon-Ling.ring@ihsmarkit.com
Maria deGuzman • Maria.deguzman@ihsmarkit.com

IHS Markit's Chemical Economics Handbook – Polyurethane Foams 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 – Polyurethane Foams has been compiled using primary interviews with key suppliers, organizations and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence, 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

Contents

Executive summary	6
Summary	8
Americas	11
Europe, Middle East, and Africa	12
Asia Pacific	12
Key industry drivers	13
Introduction	14
Manufacturing processes	15
Flexible polyurethane foams	15
– Alternative blowing agents	17
– Chemical additives	17
– Forced foam cooling	17
– Controlled-pressure foaming	17
– Carbon dioxide system	17
Rigid polyurethane and polyisocyanurate (PU/PIR) foams	18
Foam systems	19
Environmental issues	20
Blowing agents	20
Flammability standards	24
Recycling	25
Supply and demand by region	27
United States	27
– Producing companies	27
– Production	33
– Consumption	34
– Flexible foams	34
– Bedding	37
– Transportation	37
– Furniture	38
– Flooring underlay	38
– Packaging	40
– Textiles	40
– Other	40
– Rigid foams	40
– Construction	45
– Appliances	45
– Industrial insulation	46
– Packaging	46
– Transportation	47
– Other	47

– Price	47
– Trade	48
Canada	49
– Producing companies	49
– Salient statistics	50
– Flexible foams	50
– Rigid foams	52
Mexico	54
– Producing companies	54
– Salient statistics	56
– Flexible foams	56
– Rigid foams	57
Central and South America	59
– Producing companies	59
– Salient statistics	60
Europe, Middle East, and Africa	63
– Western Europe	64
– Producing companies	64
– Production	70
– Consumption	71
– Flexible and semirigid foams	72
– Rigid foams	73
– Price	75
– Trade	76
– Flexible foam	77
– Rigid foam	78
– Central and Eastern Europe	79
– Producing companies	79
– Production	83
– Consumption	83
– Trade	85
– Middle East and Africa	86
– Production	86
– Consumption	86
China	87
– Producing companies	87
– Salient statistics	90
– Consumption	91
– Flexible foam	91
– Rigid foam	93
– Trade	94
Japan	96
– Producing companies	96

– Production	98
– Consumption	100
– Flexible foam	100
– Transportation	101
– Furniture and bedding	101
– Other	101
– Rigid foam	101
– Construction and industrial insulation	102
– Refrigeration	103
– Other	103
– Price	103
– Trade	105
Other Asia	105
– Producing companies	105
– Salient statistics	108
– India	110
– South Korea	111
– Taiwan	112
– Other countries	113
Oceania	113
Additional resources	115
Revisions	117

IHS Markit Customer Care

CustomerCare@ihsmarkit.com

Americas: +1 800 IHS CARE (+1 800 447 2273)

Europe, Middle East, and Africa: +44 (0) 1344 328 300

Asia and the Pacific Rim: +604 291 3600

Disclaimer

The information contained in this report is confidential. Any unauthorized use, disclosure, reproduction, or dissemination, in full or in part, in any media or by any means, without the prior written permission of IHS Markit or any of its affiliates ("IHS Markit") is strictly prohibited. IHS Markit owns all IHS Markit logos and trade names contained in this report that are subject to license. Opinions, statements, estimates, and projections in this report (including other media) are solely those of the individual author(s) at the time of writing and do not necessarily reflect the opinions of IHS Markit. Neither IHS Markit nor the author(s) has any obligation to update this report in the event that any content, opinion, statement, estimate, or projection (collectively, "information") changes or subsequently becomes inaccurate. IHS Markit makes no warranty, expressed or implied, as to the accuracy, completeness, or timeliness of any information in this report, and shall not in any way be liable to any recipient for any inaccuracies or omissions. Without limiting the foregoing, IHS Markit shall have no liability whatsoever to any recipient, whether in contract, in tort (including negligence), under warranty, under statute or otherwise, in respect of any loss or damage suffered by any recipient as a result of or in connection with any information provided, or any course of action determined, by it or any third party, whether or not based on any information provided. The inclusion of a link to an external website by IHS Markit should not be understood to be an endorsement of that website or the site's owners (or their products/services). IHS Markit is not responsible for either the content or output of external websites. Copyright © 2019, IHS Markit®. All rights reserved and all intellectual property rights are retained by IHS Markit.

