



# HTC Global Market Intelligence

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**Regions:** EMEA, China

## Company News Tracking

- Covestro announced the launch of a new generation of bio-attributed flexible polyurethane foams for the bedding industry in EMEA, utilizing mass balance-certified raw materials to meet increasing demand for sustainable products. — *Covestro* Dec 09, 2025
- BASF expanded its sales and technical partnership network in East China with a new customer innovation center aimed at supporting regional PU product developers. — *BASF* Dec 03, 2025
- Recticel announced a capital investment plan to increase PU insulation panel capacity at its French manufacturing site, supporting demand growth from EU construction sustainability mandates. — *Recticel* Nov 29, 2025
- Wanhua Chemical Group signed a new strategic agreement with a leading Chinese automotive supplier to deliver high-performance polyurethane-based interior solutions. — *Wanhua Chemical* Nov 26, 2025

## Regional Market Monitoring

- EMEA polyurethane demand remained relatively stable, with the construction, insulation, and automotive sectors compensating for softness in furniture markets linked to inflationary pressures. — *ICIS* Dec 13, 2025
- China's flexible PU foam sector saw moderate recovery in output volumes for November, attributed to post-holiday inventory restocking and strong mattress exports. — *China Chemical Reporter* Dec 05, 2025

- The announcement of new energy efficiency regulations in Germany is expected to drive increased domestic demand for polyurethane-based insulation products in 2026. — *Chemical & Engineering News* Dec 01, 2025

## Industry Context & Insight

- Upward pricing pressure on polyurethane raw materials in EMEA is anticipated to continue into 2026, largely driven by feedstock constraints and increased regulatory costs targeting carbon emissions. — *Platts* Dec 11, 2025
- Major Chinese producers, including Wanhua and BASF, are increasing focus on automotive lightweighting applications for PU as EV demand accelerates in China and EMEA. — *Automotive News China* Nov 20, 2025

## PU Value-Chain Analysis

- Persistent supply chain bottlenecks for isocyanates in EMEA, exacerbated by port congestion in the Mediterranean, have led to longer lead times for downstream converters and system houses. — *Chemweek* Nov 30, 2025
- Reported increased imports of Chinese polyols into southern Europe, partly as a response to local supply/demand imbalances and efforts to contain cost increases at foam producers. — *PU Magazine International* Nov 25, 2025

## Competitive Intelligence

- Covestro's new bio-attributed foam product is expected to provide a differentiation lever against traditional petrochemical PU competitors in the bedding and furniture markets. — *Covestro* Dec 09, 2025
- Recticel's French capacity investment underscores the company's intent to hold market share in the rapidly expanding European PU insulation segment. — *Recticel* Nov 29, 2025
- Rising polyol imports into EMEA may challenge local producers on price, especially smaller system houses with less leverage on raw material contracts. — *PU Magazine International* Nov 25, 2025

## Sustainability & Regulation Tracking

- BASF and Covestro ramped up their portfolios of ISCC PLUS-certified polyurethane products in both EMEA and China, aiming to satisfy increasingly strict end-user sustainability requirements. — *BASF* Dec 03, 2025
- EU Parliament's preliminary vote on expanded chemical reporting for downstream PU products signals the likelihood of additional compliance requirements in 2026. — *European*

*Coatings Journal* Nov 28, 2025

- China's Ministry of Ecology and Environment released new draft guidelines on VOC emissions for rigid PU foam applications, building momentum for stricter standards in major producing provinces. — *China Chemical Reporter* Dec 08, 2025

## Capacity & Asset Moves

- Recticel committed €35 million to debottlenecking and expanding its French insulation panel plant for PU products, targeting a 25% output increase by mid-2026. — *Recticel* Nov 29, 2025
- Wanhua Chemical confirmed operational start-up of its new MDI line in Yantai, adding 400kt/year to regional supply by December 2025. — *Wanhua Chemical* Dec 10, 2025

## M&A and Partnerships

- Wanhua Chemical Group announced a strategic partnership with a leading auto interior supplier in China, focusing on next-generation polyurethane seat foam systems. — *Wanhua Chemical* Nov 26, 2025
- BASF advanced its collaboration with a top Chinese mattress manufacturer, facilitating early commercial launches of PU mattresses containing recycled content. — *BASF* Dec 03, 2025

## Early-Warning Signals

- Mediterranean logistics disruptions threaten prompt supply of isocyanates to southern European PU processors through at least early Q1 2026. — *Chemweek* Nov 30, 2025
- Cost escalation for TDI and MDI feedstocks could strain converter cash flows if raw material surcharges remain elevated into 2026. — *Platts* Dec 11, 2025

## Custom Alerts & Updates

- Stakeholders in EMEA and China are advised to monitor regulatory developments regarding both VOC emissions in China and chemical data reporting in the EU, as compliance costs are likely to affect operational margins in 2026. — *European Coatings Journal* Nov 28, 2025

## Executive-Ready Briefings

- Strategic investments in capacity by Recticel (France) and Wanhua (Yantai, China) reflect continued confidence in insulation and construction PU applications despite macroeconomic headwinds.
- Raw material price volatility and regulatory shifts are primary operational risks for the coming quarters across EMEA and China markets.

- Growing focus on sustainability—including ISCC PLUS certification and increased recycled content for end-use foam and insulation products—is now a baseline expectation in both regions' market structures.
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#### Polyurethane Observatory

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