



## **POLYURETHANE CHEMICALS AND PRODUCTS IN EUROPE, MIDDLE EAST & AFRICA (EMEA), 2025**

**IAL Consultants is pleased to announce the recent publication of the 18<sup>th</sup> edition of its report on the markets for Polyurethane Chemicals and Products in Europe, Middle East and Africa.**

This new study updates and expands upon the information included in our previous study published in 2024. The information contained within this report is based upon an extensive programme of interviews throughout the industry. The report contains both PU product production and raw material consumption figures, with 2024 as the base year and market forecasts provided to 2029.

**The data is also available separately in a database format for subscribers, enabling the manipulation and output of data.**

### **Market Overview**

The market for polyurethanes has experienced several challenging years in the EMEA region. Production declined by 6.4% in 2020 but recovered somewhat in 2021 with 3.1% growth. Economic and political issues, not least the Russia-Ukraine conflict, caused a decline of over 5% in production in 2022. Overall, 2023 was a better year than 2022, but there was still a drop of 2.9%. For 2024, IAL is showing a decline of 2.3%, with total output standing at 6.04 million tonnes.

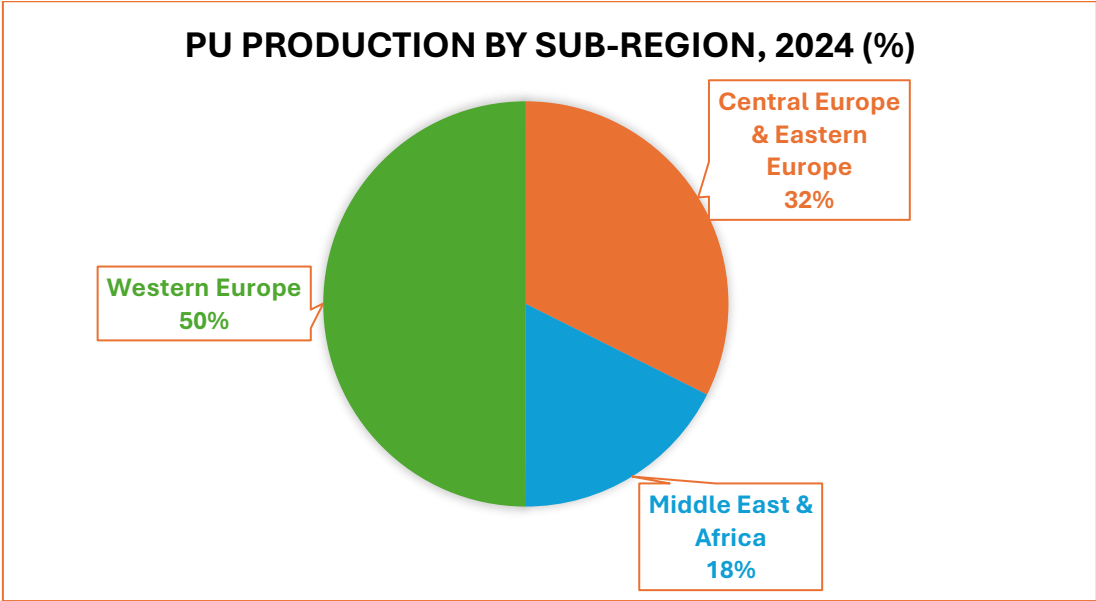
Growth should resume in 2025, albeit at a low level, before accelerating in 2026. There are continuing uncertainties across the global economy, not least the hostilities in Ukraine and Gaza, plus the trade difficulties that have opened up between the US and the rest of the world. It remains to be seen what the impact of the Trump administration's tariffs on the global polyurethane supply chain will be.

Many European countries saw a downturn in consumer demand and construction activity in 2024, thereby impacting both rigid and flexible foams. There was also a surprising stagnation in many automotive markets.

Rigid foam leapfrogged flexible foam once again to become the largest product category for PU production. Both product types together represent 67% of the overall market. Binders account for the smallest share of PU production at just 3.5%.

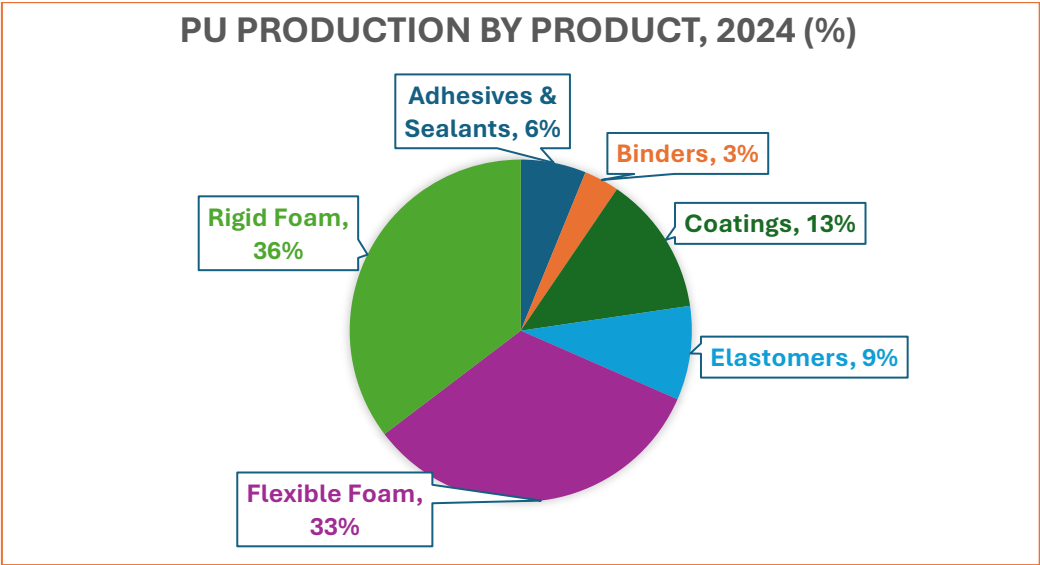
Amongst the product categories, the steepest decline was in flexible foam (- 4.2%) while the shallowest decrease was in rigid foam (-0.2%). By individual product type, there were very few segments to show growth overall across EMEA; only spray foam, roof/tank/deck coatings and rubber crumb binders remained positive. The biggest

production losses compared to 2023 were for auto glazing sealants, spandex, auto adhesives, foundry core binders and TPU.



Western Europe produced 3 million tonnes of polyurethane products in 2024, with more than a quarter produced in Germany alone; total output in Western Europe was down 4.1%. The best growth potential is still present outside Western Europe, where the industry is less mature. The second largest region is Eastern Europe.

All regions experienced a decline in 2024, with the exception of Africa (+2.1%) and the Middle East (+6.3%). The poorest performance came in Central Europe, with a decline in PU output of nearly 7%. Much of the opportunity for further growth resides in the Middle East, notably in Saudi Arabia and the UAE.



The data in this eight-volume report include raw material consumption by product type, by region, by country and by major end-use industry. The Raw Materials volume contains comprehensive supply and demand data for all the major polyurethane raw material types. The Major End-Use Markets volume contains an overview of the major markets for PU products and a summary of trends and drivers.

The report is available for the following prices:

	Price
<b>Volume 1 - Raw Materials</b>	<b>Only available with full report</b>
<b>Volume 2 - Flexible Foam</b>	<b>€ 5,700</b>
<b>Volume 3 - Rigid Foam</b>	<b>€ 5,700</b>
<b>Volume 4 - Coatings</b>	<b>€ 4,200</b>
<b>Volume 5 - Adhesives &amp; Sealants</b>	<b>€ 3,000</b>
<b>Volume 6 - Elastomers</b>	<b>€ 4,200</b>
<b>Volume 7 - Binders</b>	<b>€ 1,600</b>
<b>Volume 8 - Major End-Use Markets</b>	<b>€ 5,700</b>
<b>COMPLETE REPORT WITH DATABASE ACCESS</b>	<b>€ 19,200</b>

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