PLASTICISERS
Plasticisers (US: plasticizers) are colourless and odourless liquids used primarily to soften plastic. Over 85% of all plasticisers consumed in Europe are employed in durable flexible PVC applications, largely for the construction, automotive and wire & cable sectors. Some plasticisers are used in non-PVC applications such as coatings, rubber products, adhesives and sealants.

EUROPEAN MARKETS TRENDS

- **WIRE & CABLE**: Flexible PVC cables offer electrical insulation, strength and safety at a wide range of operating temperatures. Benefits include long service life, durability and recyclability of offal materials.
- **AUTOMOTIVE**: Plasticisers are used in automotive parts making them flexible and resilient, e.g. in artificial leather and underbody coatings.
- **MEDICAL**: Medical devices such as blood bags, examination and surgical gloves.
- **PAINT**: Plasticisers make paint softer, more flexible and adherent. They can be used in coatings or other liquid products for which low level of emissions is desired.
- **FILM & SHEET**: Coated PVC adds, such as stationery films of different thickness and flexibility to be used in various applications such as stationery products, plasticisers allow formulators to increase the service and shelf life of end products, plasticisers are used to increase the service and shelf life of end products.
- **COATED FABRICS**: PVC coated polyester is the flexible material used in dashboards, which must be safe in the event of an impact.
- **CLADDING, ROOFING, WALLCOVERING**: Flexible PVC – often reinforced with fiberglass – is durable, insulates, can stand ultraviolet light and ozone.
- **FLOORING & FLOORCOVERING**: Plasticisers followed by terephthalates. Other plasticisers are also used in non-PVC applications such as coatings, rubber products, adhesives and sealants.

**CLASSIFIED PLASTICISERS**

- **HMW Phthalates**
- **LMW Phthalates**
- **Terephthalates**
- **Other Plasticisers**

**NON-CLASSIFIED PLASTICISERS**

- **DINP**
- **DIDP**
- **DPHP**

**PLASTICISERS**

- **DOP**
- **DBP**
- **BBP**

**EUROPEAN MARKET (2017)**

- **1,35 M TONS**
- **7,5 M TONS**

**EUROPEAN MARKET USE**

- **25%**
- **80%**
- **60%**
- **80%**

**EUROPE’S PLASTICISERS USE**

- **12%**
- **40%**
- **16%**
- **18%**
- **20%**

**Source**: 2018 IHS and European Plasticisers estimates

Modern plasticisers have undergone extensive testing for possible health and environmental effects and are amongst the most widely investigated of all chemical substances. In Europe, the listing of all plasticisers is regulated under REACH, the most comprehensive product safety regulation in the world.

**REACH Candidate List**

This table is for illustration purposes only. The list of plasticisers is non-exhaustive and box sizes do not accurately represent market volumes.
SPORTS
Plasticisers make PVC bendable and soft in order to withstand considerable physical stress without breaking. Flexible PVC is used in a large array of sporting gear, clothing and footwear.

FLOORING
PVC floors are not only stylish and affordable but also resistant to dirt, water, noise and temperature as well as being anti-slip. While requiring low maintenance, they ensure high hygiene standards. In Europe, the choice of plasticisers used to manufacture toys is strictly regulated by REACH.

RUBBER
Plasticiser-containing rubber is commonly used in seals, conveyor belts, automotive tubes and hoses. Plasticisers improve the rubber’s overall flexibility, low temperature properties and increase its heat resistance.

FLEXIBLE PVC makes toys soft, flexible and safe by replacing or protecting sharp edges and avoiding brittleness. In Europe, the choice of plasticisers used to manufacture toys is strictly regulated by REACH.