

# Global Aliphatic TPU Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Aliphatic TPU market size is expected to reach \$ 2101 million by 2032, rising at a market growth of 7.8% CAGR during the forecast period (2026-2032).

Aliphatic Thermoplastic Polyurethane (Aliphatic TPU) is a class of high-performance thermoplastic elastomers synthesized using aliphatic diisocyanates as key reactive components. Owing to the absence of aromatic rings in its molecular backbone, aliphatic TPU exhibits outstanding resistance to yellowing, ultraviolet radiation, and long-term weathering, while maintaining stable mechanical properties under prolonged outdoor exposure. The material is typically supplied in the form of pellets, films, or sheets and can be processed through conventional thermoplastic techniques such as injection molding, extrusion, and film blowing. Based on soft segment chemistry, aliphatic TPU is commonly classified into polyester-based, polyether-based, and polycarbonate-based grades, and is widely used in medical devices and tubing, consumer electronics housings and protective components, high-end functional films, automotive interior and exterior parts, and other applications requiring long-term appearance stability and durability. It is generally regarded as a premium and functional segment within the overall TPU product landscape.

Driven by growing demand for high-performance and specialty elastomer materials, the global aliphatic TPU market has continued to expand steadily. In 2025, global aliphatic thermoplastic polyurethane production reached approximately 80?120 thousand metric tons, with supply concentrated among a limited number of technologically advanced producers in Europe, North America, and Asia-Pacific. Due to higher raw material and processing costs, aliphatic TPU commands a significantly higher FOB price than aromatic TPU, with mainstream prices typically ranging from USD 8,000 to 15,000 per metric ton, and premium medical or optical grades priced at the upper end of the range. Against the backdrop of rising global demand for high-performance and specialty materials, aliphatic TPU is gradually transitioning from a niche material to a strategically

important elastomer category. Industries such as healthcare, consumer electronics, and new energy vehicles increasingly prioritize long-term material stability, visual consistency, and safety compliance, creating favorable conditions for the adoption of aliphatic TPU. In particular, its non-yellowing characteristics and durability have become key material selection criteria in wearable devices, medical tubing, and transparent protective films, supporting steady growth in global demand. However, the market also faces structural challenges. Aliphatic TPU production involves higher costs and more complex manufacturing processes compared with aromatic TPU, requiring stringent control over raw materials, formulations, and processing conditions. These factors limit rapid capacity expansion and raise entry barriers for new suppliers. In addition, downstream customers are placing greater emphasis on quality consistency and regulatory compliance, compelling manufacturers to invest continuously in R&D and quality management systems. Competition from alternative high-performance plastics and silicone-based materials in certain applications also exerts pressure on market penetration.

Looking ahead, demand growth for aliphatic TPU is expected to be driven primarily by high value-added applications. Medical device components, consumer electronics housings and protective materials, and premium automotive interior and exterior parts will continue to reshape the demand structure. As global manufacturing trends move toward higher performance, lightweight design, and longer product lifecycles, aliphatic TPU is well positioned to increase its share within the overall TPU market and strengthen its role as a strategic material in advanced elastomer applications. This report studies the global Aliphatic TPU production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Aliphatic TPU and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Aliphatic TPU that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Aliphatic TPU total production and demand, 2021-2032, (K MT)

Global Aliphatic TPU total production value, 2021-2032, (USD Million)

Global Aliphatic TPU production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Aliphatic TPU consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Aliphatic TPU domestic production, consumption, key domestic manufacturers and share

Global Aliphatic TPU production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Aliphatic TPU production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Aliphatic TPU production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Aliphatic TPU market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Covestro AG, The Lubrizol Corporation, BASF SE, Huntsman Corporation, COIM S.p.A., Nam Liong Global Corporation Tainan Branch, Taiwan PU Corporation, American Polyfilm Inc., URECHEM, Dolder AG, etc. This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Aliphatic TPU market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Aliphatic TPU Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Aliphatic TPU Market, Segmentation by Type:

Pellets

Powder

Film And Sheet

Others

### Global Aliphatic TPU Market, Segmentation by Processing Technology:

Injection Molding

Extrusion

Blow Molding

Others

### Global Aliphatic TPU Market, Segmentation by Soft Segment Chemistry:

Polyester Based Aliphatic TPU

Polyether Based Aliphatic TPU

Polycarbonate Based Aliphatic TPU

### Global Aliphatic TPU Market, Segmentation by Performance Feature:

Non Yellowing

UV Resistance

Biocompatibility

Others

Global Aliphatic TPU Market, Segmentation by Application:

Medical Devices

Consumer Electronics

Automotive Components

Others

**Companies Profiled:**

Covestro AG

The Lubrizol Corporation

BASF SE

Huntsman Corporation

COIM S.p.A.

Nam Liong Global Corporation Tainan Branch

Taiwan PU Corporation

American Polyfilm Inc.

URECHEM

Dolder AG

Wanhua Chemical Group Co. Ltd.

Miracll Chemicals Co. Ltd.

Zhejiang Huafon Thermoplastic Polyurethane Co. Ltd.

KUNSUN Polymer Material Fujian Co. Ltd.

Yantai Linghua New Material Co. Ltd.

**Key Questions Answered:**

1. How big is the global Aliphatic TPU market?
2. What is the demand of the global Aliphatic TPU market?
3. What is the year over year growth of the global Aliphatic TPU market?
4. What is the production and production value of the global Aliphatic TPU market?
5. Who are the key producers in the global Aliphatic TPU market?
6. What are the growth factors driving the market demand?

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