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Global Medical Grade Thermoplastic Elastomer (TPE) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Medical Grade Thermoplastic Elastomer (TPE) market size is expected to reach $ 1858 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Medical Grade TPE refers to a class of thermoplastic elastomer compounds specifically developed for medical devices, diagnostic equipment, pharmaceutical packaging, and other healthcare applications. These materials combine rubber-like flexibility, elasticity, sealing performance, and soft-touch properties with thermoplastic processing advantages such as injection molding, extrusion, and overmolding. Compared with general-purpose TPE, medical grades are typically manufactured under tighter controls for raw-material purity, heavy metals, plasticizers, latex, extractables, and lot-to-lot consistency, and selected formulations are designed to comply with biocompatibility and medical safety requirements such as ISO 10993, USP Class VI, and cytotoxicity testing. Certain grades are also engineered to withstand sterilization methods including ethylene oxide, gamma irradiation, and electron beam treatment. KRAIBURG TPE's THERMOLAST M portfolio, for example, includes medical compounds compliant with selected ISO 10993-4, -5, -10, and -11 tests and USP Class VI, while offering transparent, sterilizable, latex-free, and PVC-free options. Typical applications include respiratory and infusion tubing, catheters, syringe seals, valves, diaphragms, medical connectors, soft-touch device components, pharmaceutical closures, and flexible diagnostic-device parts.

Key Findings

In 2025, global Medical Grade TPE production reached approximately 184k tons, with

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an average global market price of around US$6.5k per ton

Biocompatibility sterilization compatibility low extractables and formulation consistency are central purchasing criteria for Medical Grade TPE

Medical tubing catheters seals pharmaceutical closures diagnostics and device overmolding form major downstream demand areas

Change control and long-term material supply are becoming increasingly important competitive capabilities for medical-material suppliers

Market Trends

The Medical Grade TPE market is evolving from general-purpose elastomer substitution toward highly controlled application-specific material platforms. Medical-device manufacturers increasingly require suppliers to provide not only mechanical properties but also documented formulation consistency, raw-material traceability, change-control procedures, biological testing support and sterilization compatibility. KRAIBURG TPE's THERMOLAST M portfolio illustrates this direction through dedicated medical production, controlled raw-material purity, defined supply-security procedures and testing under selected ISO 10993 and USP Class VI protocols. At the product level, demand is moving toward high-transparency tubing, low-extractable seals, resealable membranes, soft-touch overmolding and PVC- or latex-free alternatives. High-performance polymers are also becoming increasingly important in minimally invasive devices. Arkema's Pebax MED portfolio spans flexible through relatively rigid PEBA grades for catheter, tubing, film and other healthcare uses, demonstrating the increasing need for materials that combine flexibility, kink resistance, torque transmission and predictable mechanical behavior. Digital diagnostics, home healthcare and wearable medical devices are creating additional demand for materials combining soft touch, chemical resistance, repeated deformation capability and compatibility with rigid engineering plastics.

Market Dynamics

Drivers

Growth in Medical Grade TPE is driven by increasing medical-device consumption, aging populations, expansion of minimally invasive procedures, growth in diagnostic

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and home-care equipment, and continued substitution of conventional PVC, latex and thermoset rubber in selected applications. TPE materials allow manufacturers to use high-productivity thermoplastic processes while retaining elasticity, sealing and soft-touch properties, making them attractive for tubing, masks, syringe components, valves, diaphragms and multi-material device assemblies. Avient's Versaflex HC portfolio, for example, targets medical and biopharma tubing, gaskets, stoppers, bags, bottles and films while emphasizing low extractables, resealability, sterilization suitability and bonding capability. The growing sophistication of catheter-based intervention is another important driver for TPU, TPC and PEBA materials that provide higher strength and controlled flexibility. At the same time, healthcare companies increasingly prioritize supply continuity and controlled material changes because reformulation can trigger additional downstream qualification work, making long-term technical relationships with medical-grade material suppliers more valuable.

Restraints

The principal restraints arise from qualification complexity, higher material and compliance costs, long customer-validation cycles and the difficulty of balancing softness with chemical, mechanical and sterilization performance. A Medical Grade TPE suitable for an external device component cannot automatically be assumed suitable for blood contact, drug contact or long-term tissue contact because biological evaluation depends on the intended use, contact type and duration. KRAIBURG TPE explicitly distinguishes raw-material biocompatibility support from approval of the final medical device, illustrating the importance of application-specific qualification. Sterilization introduces another constraint because gamma radiation, electron beam, steam and EtO can affect color, molecular structure, elasticity or mechanical performance differently across TPE chemistries. Specialized materials also require tighter production controls and higher-purity feedstocks, increasing cost relative to general-purpose TPE. Once a material has been validated in a regulated medical device, switching suppliers may require substantial documentation and retesting, limiting purchasing flexibility while simultaneously creating barriers for new material entrants.

Opportunities

The most attractive opportunities are concentrated in minimally invasive devices, catheter systems, drug-delivery components, biopharmaceutical fluid handling, respiratory equipment, diagnostics and advanced medical-device overmolding. PEBA has a particularly strong opportunity in catheter shafts and related components because

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its hardness and modulus can be tuned across a broad range while maintaining flexibility, kink resistance and good dynamic performance. Arkema offers multiple Pebax MED grades from relatively soft to high-hardness materials and identifies catheter, tubing and other single-use healthcare applications as key uses. Additional opportunities are emerging in PVC-free and latex-free tubing, resealable pharmaceutical closures and diagnostic seals, where low extractables and chemical compatibility can justify premium materials. Home healthcare and wearable devices create another growth area for soft-touch TPE that adheres to PC, ABS, PA or other engineering plastics. There is also potential for more sustainable medical polymers, although recycled content faces significantly greater qualification constraints in regulated healthcare than in consumer applications, making bio-based feedstocks and lower-carbon virgin polymer technologies more immediately practical.

Challenges

The central technical challenge is achieving consistent biocompatibility, mechanical performance, sterilization resistance and processability without creating excessive extractables or formulation variability. Medical TPE suppliers must control polymers, oils, additives, pigments and processing conditions more tightly than general-purpose compounders because small formulation changes can affect downstream qualification. Multi-material medical devices add another layer of complexity, requiring reliable adhesion between the elastomer and substrates such as PP, PC, ABS, PET-G or polyamides. KRAIBURG TPE's medical portfolio explicitly offers adhesion to multiple polyolefins and engineering plastics, indicating how substrate compatibility has become a major product-development requirement. High-performance catheter materials face different challenges, including kink resistance, torque transfer, dimensional control and stable modulus after sterilization. Software-enabled diagnostic and wearable products additionally expose elastomer surfaces to disinfectants and repeated cleaning, requiring chemical resistance and long-term appearance retention. Supply-security requirements further increase operational complexity because medical customers increasingly expect notification of formulation changes and stable long-term availability.

Industry Chain Analysis

The upstream Medical Grade TPE industry includes styrenic block copolymers such as SEBS, polyurethane raw materials, TPV feedstocks, copolyester elastomers, polyamide and polyether intermediates for PEBA, together with high-purity process oils, stabilizers,

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antioxidants, pigments, radiopaque additives and other functional ingredients. Midstream producers polymerize or compound these materials and provide medical-grade formulations with controlled purity, mechanical properties, sterilization behavior and supporting regulatory documentation. Representative suppliers include KRAIBURG TPE, Avient and Arkema. KRAIBURG TPE supplies medical styrenic TPE compounds under THERMOLAST M, Avient offers healthcare-focused TPE and TPU through its Versaflex HC portfolio, while Arkema supplies dedicated Pebax MED PEBA grades for medical tubing, catheters and other advanced devices. Downstream converters use injection molding, extrusion, co-extrusion, film processing and overmolding to manufacture finished components, followed by device assembly, sterilization and regulatory qualification. Value creation is concentrated in polymer chemistry, formulation purity, processing consistency, biological testing support, change control, technical service and long-term supply reliability.

Segment Insights

Styrenic Thermoplastic Elastomers form one of the broadest Medical Grade TPE categories, particularly for soft seals, closures, respiratory interfaces, syringe components, diagnostic parts and flexible tubing. Hydrogenated styrenic systems such as SEBS are especially suitable where softness, transparency, low odor, elastic recovery and polyolefin overmolding are important. KRAIBURG TPE's THERMOLAST M is identified as a TPS platform for medical and pharmaceutical applications and covers an exceptionally broad hardness range from very soft Shore A grades into Shore D materials, with injection molding and extrusion capability. Thermoplastic Polyurethane is positioned toward applications requiring higher tensile strength, abrasion resistance, toughness and chemical durability, including selected tubing, catheter, wearable-device and overmolded components. Thermoplastic Vulcanizates are useful where rubber-like compression behavior, heat resistance and repeated sealing performance are required, although their medical use is more application-specific than styrenic TPE.

Thermoplastic Polyester Elastomers provide higher thermal, fatigue and chemical resistance and are suitable for demanding medical tubing, flexible components and devices exposed to repeated mechanical cycling. Celanese explicitly identifies medical tubing and devices among applications for its Hytrel TPC platform, highlighting the relevance of polyester elastomers where durability and stable mechanical behavior over a wide temperature range are required. Polyether Block Amide represents a smaller-volume but high-value medical segment, particularly in minimally invasive and catheter applications. Arkema's Pebax MED family covers a broad range of hardness and modulus levels; for example, Pebax 4033 SA 01 MED has a conditioned Shore D

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hardness of approximately 35, while Pebax 7033 SA 01 MED reaches about Shore D 61 and supports extrusion, film extrusion, injection molding and tube extrusion. This wide performance window enables device designers to combine multiple PEBA grades in multilayer catheter structures to control flexibility along different sections of the device.

Downstream Market Opportunities

Medical Grade TPE demand is increasingly differentiated by device function rather than simply by polymer type. High-volume soft-component opportunities include syringe seals and caps, respiratory masks, tubing, diagnostic seals, pharmaceutical closures, valves and flexible connectors, where styrenic TPE and selected TPU materials provide softness, sealing and processing efficiency. Higher-value opportunities occur in catheter shafts, minimally invasive delivery systems and specialized tubing, where PEBA, TPU and polyester elastomers provide more precise combinations of stiffness, flexibility, torque transmission and kink resistance. Arkema specifically positions Pebax MED for catheter and PVC-free tubing applications and notes its ability to combine elasticity, kink resistance and pressure resistance. Biopharmaceutical processing and diagnostics also create opportunities for low-extractable materials, while medical electronics and home-care devices increasingly use TPE as soft-touch grips, seals and protective overmolding. Suppliers able to offer multiple polymer chemistries and application-engineering support are therefore better positioned to capture both high-volume commodity replacement and high-value medical-device design opportunities.

Regional Insights

North America remains one of the most important high-value markets for Medical Grade TPE because of its large medical-device industry, strong minimally invasive device ecosystem and extensive pharmaceutical and diagnostic manufacturing base. Demand is concentrated not only in high-volume disposables but also in catheter systems, surgical devices and sophisticated diagnostic equipment requiring tightly controlled material specifications. Europe is similarly characterized by mature medical-device and pharmaceutical industries, stringent regulatory expectations and strong demand for traceability, change control and long-term material consistency. Asia-Pacific is increasingly important both as a medical-device manufacturing base and as a consumption market. China has expanded production of disposables, diagnostics, medical electronics and higher-value devices, while Japan and South Korea maintain significant precision medical and healthcare manufacturing capabilities. KRAIBURG

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TPE has developed the THERMOLAST H platform specifically for Asia-Pacific healthcare and medical-device applications, with materials aligned with ISO 10993-5 and China's GB/T 16886.5 requirements, illustrating increasing localization of medical-material portfolios.

Competitive Landscape Analysis

The Medical Grade TPE market is more technically segmented than the general TPE market because no single chemistry dominates every medical application. Representative competitors include KRAIBURG TPE, Avient and Arkema. KRAIBURG TPE is particularly established in soft medical styrenic TPE, supported by dedicated production, change-control procedures, sterilization compatibility and extensive medical-biocompatibility testing. Avient competes through healthcare-specific TPE and TPU platforms that emphasize sealing, low extractables, chemical resistance, bonding and multiple sterilization options, giving it broad exposure to diagnostics, tubing and molded medical components. Arkema occupies a differentiated position in high-performance PEBA through its extensive Pebax MED family, particularly for catheters and minimally invasive devices requiring controlled flexibility and mechanical performance. Competitive advantage increasingly depends on application engineering, biological and regulatory documentation, supply continuity and change management in addition to conventional material performance, making qualification history and customer technical relationships significant barriers to entry.

Report Scope

This report studies the global Medical Grade Thermoplastic Elastomer (TPE) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Medical Grade Thermoplastic Elastomer (TPE) 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 Medical Grade Thermoplastic Elastomer (TPE) that contribute to its increasing demand across many markets.

Highlights and key features of the study

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Global Medical Grade Thermoplastic Elastomer (TPE) total production and demand, 2021-2032, (Kilotons)

Global Medical Grade Thermoplastic Elastomer (TPE) total production value, 2021-2032, (USD Million)

Global Medical Grade Thermoplastic Elastomer (TPE) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Medical Grade Thermoplastic Elastomer (TPE) consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Medical Grade Thermoplastic Elastomer (TPE) domestic production, consumption, key domestic manufacturers and share

Global Medical Grade Thermoplastic Elastomer (TPE) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Medical Grade Thermoplastic Elastomer (TPE) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Medical Grade Thermoplastic Elastomer (TPE) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Medical Grade Thermoplastic Elastomer (TPE) 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 Kraiburg TPE, RTP Company, BASF, Borealis, Teknor Apex, Tosaf, Kuraray, Avient, Celanese, Arkema, 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 Medical Grade Thermoplastic Elastomer (TPE) market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) 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 Medical Grade Thermoplastic Elastomer (TPE) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Medical Grade Thermoplastic Elastomer (TPE) Market, Segmentation by Type:

TPS

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TPU

TPV

COPE

PEBA

Global Medical Grade Thermoplastic Elastomer (TPE) Market, Segmentation by Processing Method:

Injection Molding Grade

Extrusion Grade

Global Medical Grade Thermoplastic Elastomer (TPE) Market, Segmentation by Hardness:

Shore A 0–30

Shore A 30–60

Shore A 60–95

Others

Global Medical Grade Thermoplastic Elastomer (TPE) Market, Segmentation by Application:

Breathing Tubing

Cathetering Tubes

Syringe Seals

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Medical Connectors

Soft-Touch Coating For Medical Devices

Others

Companies Profiled:

Kraiburg TPE

RTP Company

BASF

Borealis

Teknor Apex

Tosaf

Kuraray

Avient

Celanese

Arkema

Hexpol

Elastocon AB

Elastron

Enplast Americas

LIKON

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Zylog

Franplast

Everlon

Phon Tech

TSRC

Polyrocks Chemical

Wynca

Tairuifeng New Materials

ATP Polymer Technology

Key Questions Answered

1. How big is the global Medical Grade Thermoplastic Elastomer (TPE) market?
2. What is the demand of the global Medical Grade Thermoplastic Elastomer (TPE) market?
3. What is the year over year growth of the global Medical Grade Thermoplastic Elastomer (TPE) market?
4. What is the total value of the global Medical Grade Thermoplastic Elastomer (TPE) market?
5. Who are the Major Players in the global Medical Grade Thermoplastic Elastomer (TPE) market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Medical Grade Thermoplastic Elastomer (TPE) Introduction
1.2 World Medical Grade Thermoplastic Elastomer (TPE) Supply & Forecast
  1.2.1 World Medical Grade Thermoplastic Elastomer (TPE) Production Value (2021 & 2025 & 2032)
  1.2.2 World Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032)
  1.2.3 World Medical Grade Thermoplastic Elastomer (TPE) Pricing Trends (2021-2032)
1.3 World Medical Grade Thermoplastic Elastomer (TPE) Production by Region (Based on Production Site)
  1.3.1 World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Region (2021-2032)
  1.3.2 World Medical Grade Thermoplastic Elastomer (TPE) Production by Region (2021-2032)
  1.3.3 World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Region (2021-2032)
  1.3.4 North America Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032)
  1.3.5 Europe Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032)
  1.3.6 China Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032)
  1.3.7 Japan Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Medical Grade Thermoplastic Elastomer (TPE) Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Medical Grade Thermoplastic Elastomer (TPE) Major Market Trends

2 DEMAND SUMMARY

2.1 World Medical Grade Thermoplastic Elastomer (TPE) Demand (2021-2032)
2.2 World Medical Grade Thermoplastic Elastomer (TPE) Consumption by Region
  2.2.1 World Medical Grade Thermoplastic Elastomer (TPE) Consumption by Region (2021-2026)
  2.2.2 World Medical Grade Thermoplastic Elastomer (TPE) Consumption Forecast by Region (2027-2032)
2.3 United States Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)

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2.4 China Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)
2.5 Europe Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)
2.6 Japan Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)
2.7 South Korea Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)
2.8 ASEAN Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)
2.9 India Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Manufacturer (2021-2026)
3.2 World Medical Grade Thermoplastic Elastomer (TPE) Production by Manufacturer (2021-2026)
3.3 World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Manufacturer (2021-2026)
3.4 Medical Grade Thermoplastic Elastomer (TPE) Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Medical Grade Thermoplastic Elastomer (TPE) Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Medical Grade Thermoplastic Elastomer (TPE) in 2025
  3.5.3 Global Concentration Ratios (CR8) for Medical Grade Thermoplastic Elastomer (TPE) in 2025
3.6 Medical Grade Thermoplastic Elastomer (TPE) Market: Overall Company Footprint Analysis
  3.6.1 Medical Grade Thermoplastic Elastomer (TPE) Market: Region Footprint
  3.6.2 Medical Grade Thermoplastic Elastomer (TPE) Market: Company Product Type Footprint
  3.6.3 Medical Grade Thermoplastic Elastomer (TPE) Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

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4.1 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Value Comparison
4.1.1 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Value Comparison (2021 & 2025 & 2032)
4.1.2 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Comparison
4.2.1 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Consumption Comparison
4.3.1 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value (2021-2026)
4.4.3 United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2026)
4.5 China Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers and Market Share
4.5.1 China Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value (2021-2026)
4.5.3 China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2026)
4.6 Rest of World Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers, Headquarters and Production Site (State, Country)

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info@marketpublishers.com

4.6.2 Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Medical Grade Thermoplastic Elastomer (TPE) Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 TPS
5.2.2 TPU
5.2.3 TPV
5.2.4 COPE
5.2.5 PEBA
5.3 Market Segment by Type
5.3.1 World Medical Grade Thermoplastic Elastomer (TPE) Production by Type (2021-2032)
5.3.2 World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Type (2021-2032)
5.3.3 World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PROCESSING METHOD

6.1 World Medical Grade Thermoplastic Elastomer (TPE) Market Size Overview by Processing Method: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Processing Method
6.2.1 Injection Molding Grade
6.2.2 Extrusion Grade
6.3 Market Segment by Processing Method
6.3.1 World Medical Grade Thermoplastic Elastomer (TPE) Production by Processing Method (2021-2032)
6.3.2 World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Processing Method (2021-2032)
6.3.3 World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Processing Method (2021-2032)

7 MARKET ANALYSIS BY HARDNESS

+357 96 030922
info@marketpublishers.com

7.1 World Medical Grade Thermoplastic Elastomer (TPE) Market Size Overview by Hardness: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Hardness
7.2.1 Shore A 0–30
7.2.2 Shore A 30–60
7.2.3 Shore A 60–95
7.2.4 Others
7.3 Market Segment by Hardness
7.3.1 World Medical Grade Thermoplastic Elastomer (TPE) Production by Hardness (2021-2032)
7.3.2 World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Hardness (2021-2032)
7.3.3 World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Hardness (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Medical Grade Thermoplastic Elastomer (TPE) Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Breathing Tubing
8.2.2 Cathetering Tubes
8.2.3 Syringe Seals
8.2.4 Medical Connectors
8.2.5 Soft-Touch Coating For Medical Devices
8.2.6 Others
8.3 Market Segment by Application
8.3.1 World Medical Grade Thermoplastic Elastomer (TPE) Production by Application (2021-2032)
8.3.2 World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Application (2021-2032)
8.3.3 World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Kraiburg TPE
9.1.1 Kraiburg TPE Details

+357 96 030922
info@marketpublishers.com

9.1.2 Kraiburg TPE Major Business
9.1.3 Kraiburg TPE Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.1.4 Kraiburg TPE Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 Kraiburg TPE Recent Developments/Updates
9.1.6 Kraiburg TPE Competitive Strengths & Weaknesses
9.2 RTP Company
9.2.1 RTP Company Details
9.2.2 RTP Company Major Business
9.2.3 RTP Company Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.2.4 RTP Company Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 RTP Company Recent Developments/Updates
9.2.6 RTP Company Competitive Strengths & Weaknesses
9.3 BASF
9.3.1 BASF Details
9.3.2 BASF Major Business
9.3.3 BASF Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.3.4 BASF Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 BASF Recent Developments/Updates
9.3.6 BASF Competitive Strengths & Weaknesses
9.4 Borealis
9.4.1 Borealis Details
9.4.2 Borealis Major Business
9.4.3 Borealis Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.4.4 Borealis Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Borealis Recent Developments/Updates
9.4.6 Borealis Competitive Strengths & Weaknesses
9.5 Teknor Apex
9.5.1 Teknor Apex Details
9.5.2 Teknor Apex Major Business
9.5.3 Teknor Apex Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.5.4 Teknor Apex Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

9.5.5 Teknor Apex Recent Developments/Updates
9.5.6 Teknor Apex Competitive Strengths & Weaknesses
9.6 Tosaf
9.6.1 Tosaf Details
9.6.2 Tosaf Major Business
9.6.3 Tosaf Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.6.4 Tosaf Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 Tosaf Recent Developments/Updates
9.6.6 Tosaf Competitive Strengths & Weaknesses
9.7 Kuraray
9.7.1 Kuraray Details
9.7.2 Kuraray Major Business
9.7.3 Kuraray Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.7.4 Kuraray Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Kuraray Recent Developments/Updates
9.7.6 Kuraray Competitive Strengths & Weaknesses
9.8 Avient
9.8.1 Avient Details
9.8.2 Avient Major Business
9.8.3 Avient Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.8.4 Avient Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Avient Recent Developments/Updates
9.8.6 Avient Competitive Strengths & Weaknesses
9.9 Celanese
9.9.1 Celanese Details
9.9.2 Celanese Major Business
9.9.3 Celanese Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.9.4 Celanese Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Celanese Recent Developments/Updates
9.9.6 Celanese Competitive Strengths & Weaknesses
9.10 Arkema
9.10.1 Arkema Details
9.10.2 Arkema Major Business
9.10.3 Arkema Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.10.4 Arkema Medical Grade Thermoplastic Elastomer (TPE) Production, Price,

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Value, Gross Margin and Market Share (2021-2026)
9.10.5 Arkema Recent Developments/Updates
9.10.6 Arkema Competitive Strengths & Weaknesses
9.11 Hexpol
9.11.1 Hexpol Details
9.11.2 Hexpol Major Business
9.11.3 Hexpol Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.11.4 Hexpol Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Hexpol Recent Developments/Updates
9.11.6 Hexpol Competitive Strengths & Weaknesses
9.12 Elastocon AB
9.12.1 Elastocon AB Details
9.12.2 Elastocon AB Major Business
9.12.3 Elastocon AB Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.12.4 Elastocon AB Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 Elastocon AB Recent Developments/Updates
9.12.6 Elastocon AB Competitive Strengths & Weaknesses
9.13 Elastron
9.13.1 Elastron Details
9.13.2 Elastron Major Business
9.13.3 Elastron Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.13.4 Elastron Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 Elastron Recent Developments/Updates
9.13.6 Elastron Competitive Strengths & Weaknesses
9.14 Enplast Americas
9.14.1 Enplast Americas Details
9.14.2 Enplast Americas Major Business
9.14.3 Enplast Americas Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.14.4 Enplast Americas Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Enplast Americas Recent Developments/Updates
9.14.6 Enplast Americas Competitive Strengths & Weaknesses
9.15 LIKON
9.15.1 LIKON Details

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9.15.2 LIKON Major Business
9.15.3 LIKON Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.15.4 LIKON Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 LIKON Recent Developments/Updates
9.15.6 LIKON Competitive Strengths & Weaknesses
9.16 Zylog
9.16.1 Zylog Details
9.16.2 Zylog Major Business
9.16.3 Zylog Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.16.4 Zylog Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 Zylog Recent Developments/Updates
9.16.6 Zylog Competitive Strengths & Weaknesses
9.17 Franplast
9.17.1 Franplast Details
9.17.2 Franplast Major Business
9.17.3 Franplast Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.17.4 Franplast Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.17.5 Franplast Recent Developments/Updates
9.17.6 Franplast Competitive Strengths & Weaknesses
9.18 Everlon
9.18.1 Everlon Details
9.18.2 Everlon Major Business
9.18.3 Everlon Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.18.4 Everlon Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.18.5 Everlon Recent Developments/Updates
9.18.6 Everlon Competitive Strengths & Weaknesses
9.19 Phon Tech
9.19.1 Phon Tech Details
9.19.2 Phon Tech Major Business
9.19.3 Phon Tech Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.19.4 Phon Tech Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.19.5 Phon Tech Recent Developments/Updates
9.19.6 Phon Tech Competitive Strengths & Weaknesses

+357 96 030922
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9.20 TSRC
9.20.1 TSRC Details
9.20.2 TSRC Major Business
9.20.3 TSRC Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.20.4 TSRC Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.20.5 TSRC Recent Developments/Updates
9.20.6 TSRC Competitive Strengths & Weaknesses
9.21 Polyrocks Chemical
9.21.1 Polyrocks Chemical Details
9.21.2 Polyrocks Chemical Major Business
9.21.3 Polyrocks Chemical Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.21.4 Polyrocks Chemical Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.21.5 Polyrocks Chemical Recent Developments/Updates
9.21.6 Polyrocks Chemical Competitive Strengths & Weaknesses
9.22 Wynca
9.22.1 Wynca Details
9.22.2 Wynca Major Business
9.22.3 Wynca Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.22.4 Wynca Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.22.5 Wynca Recent Developments/Updates
9.22.6 Wynca Competitive Strengths & Weaknesses
9.23 Tairuifeng New Materials
9.23.1 Tairuifeng New Materials Details
9.23.2 Tairuifeng New Materials Major Business
9.23.3 Tairuifeng New Materials Medical Grade Thermoplastic Elastomer (TPE) Product and Services
9.23.4 Tairuifeng New Materials Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.23.5 Tairuifeng New Materials Recent Developments/Updates
9.23.6 Tairuifeng New Materials Competitive Strengths & Weaknesses
9.24 ATP Polymer Technology
9.24.1 ATP Polymer Technology Details
9.24.2 ATP Polymer Technology Major Business
9.24.3 ATP Polymer Technology Medical Grade Thermoplastic Elastomer (TPE) Product and Services

+357 96 030922
info@marketpublishers.com

9.24.4 ATP Polymer Technology Medical Grade Thermoplastic Elastomer (TPE) Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.24.5 ATP Polymer Technology Recent Developments/Updates
9.24.6 ATP Polymer Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Medical Grade Thermoplastic Elastomer (TPE) Industry Chain
10.2 Medical Grade Thermoplastic Elastomer (TPE) Upstream Analysis
10.2.1 Medical Grade Thermoplastic Elastomer (TPE) Core Raw Materials
10.2.2 Main Manufacturers of Medical Grade Thermoplastic Elastomer (TPE) Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Medical Grade Thermoplastic Elastomer (TPE) Production Mode
10.6 Medical Grade Thermoplastic Elastomer (TPE) Procurement Model
10.7 Medical Grade Thermoplastic Elastomer (TPE) Industry Sales Model and Sales Channels
10.7.1 Medical Grade Thermoplastic Elastomer (TPE) Sales Model
10.7.2 Medical Grade Thermoplastic Elastomer (TPE) Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Region (2021-2026) & (USD Million)
Table 3. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Region (2027-2032) & (USD Million)
Table 4. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Region (2021-2026)
Table 5. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Region (2027-2032)
Table 6. World Medical Grade Thermoplastic Elastomer (TPE) Production by Region (2021-2026) & (Kilotons)
Table 7. World Medical Grade Thermoplastic Elastomer (TPE) Production by Region (2027-2032) & (Kilotons)
Table 8. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Region (2021-2026)
Table 9. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Region (2027-2032)
Table 10. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Region (2021-2026) & (US$/Ton)
Table 11. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Region (2027-2032) & (US$/Ton)
Table 12. Medical Grade Thermoplastic Elastomer (TPE) Major Market Trends
Table 13. World Medical Grade Thermoplastic Elastomer (TPE) Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)
Table 14. World Medical Grade Thermoplastic Elastomer (TPE) Consumption by Region (2021-2026) & (Kilotons)
Table 15. World Medical Grade Thermoplastic Elastomer (TPE) Consumption Forecast by Region (2027-2032) & (Kilotons)
Table 16. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Medical Grade Thermoplastic Elastomer (TPE) Producers in 2025
Table 18. World Medical Grade Thermoplastic Elastomer (TPE) Production by Manufacturer (2021-2026) & (Kilotons)

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Table 19. Production Market Share of Key Medical Grade Thermoplastic Elastomer (TPE) Producers in 2025
Table 20. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Manufacturer (2021-2026) & (US$/Ton)
Table 21. Global Medical Grade Thermoplastic Elastomer (TPE) Company Evaluation Quadrant
Table 22. World Medical Grade Thermoplastic Elastomer (TPE) Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Medical Grade Thermoplastic Elastomer (TPE) Production Site of Key Manufacturer
Table 24. Medical Grade Thermoplastic Elastomer (TPE) Market: Company Product Type Footprint
Table 25. Medical Grade Thermoplastic Elastomer (TPE) Market: Company Product Application Footprint
Table 26. Medical Grade Thermoplastic Elastomer (TPE) Competitive Factors
Table 27. Medical Grade Thermoplastic Elastomer (TPE) New Entrant and Capacity Expansion Plans
Table 28. Medical Grade Thermoplastic Elastomer (TPE) Mergers & Acquisitions Activity
Table 29. United States VS China Medical Grade Thermoplastic Elastomer (TPE) Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Medical Grade Thermoplastic Elastomer (TPE) Production Comparison, (2021 & 2025 & 2032) & (Kilotons)
Table 31. United States VS China Medical Grade Thermoplastic Elastomer (TPE) Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)
Table 32. United States Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2026) & (Kilotons)
Table 36. United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Market Share (2021-2026)
Table 37. China Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value, (2021-2026) & (USD Million)

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Table 39. China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production, (2021-2026) & (Kilotons)
Table 41. China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Market Share (2021-2026)
Table 42. Rest of World Based Medical Grade Thermoplastic Elastomer (TPE) Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production, (2021-2026) & (Kilotons)
Table 46. Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Market Share (2021-2026)
Table 47. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Medical Grade Thermoplastic Elastomer (TPE) Production by Type (2021-2026) & (Kilotons)
Table 49. World Medical Grade Thermoplastic Elastomer (TPE) Production by Type (2027-2032) & (Kilotons)
Table 50. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Type (2021-2026) & (USD Million)
Table 51. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Type (2027-2032) & (USD Million)
Table 52. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Type (2021-2026) & (US$/Ton)
Table 53. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Type (2027-2032) & (US$/Ton)
Table 54. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Processing Method, (USD Million), 2021 & 2025 & 2032
Table 55. World Medical Grade Thermoplastic Elastomer (TPE) Production by Processing Method (2021-2026) & (Kilotons)
Table 56. World Medical Grade Thermoplastic Elastomer (TPE) Production by Processing Method (2027-2032) & (Kilotons)
Table 57. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Processing Method (2021-2026) & (USD Million)
Table 58. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by

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Processing Method (2027-2032) & (USD Million)
Table 59. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Processing Method (2021-2026) & (US$/Ton)
Table 60. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Processing Method (2027-2032) & (US$/Ton)
Table 61. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Hardness, (USD Million), 2021 & 2025 & 2032
Table 62. World Medical Grade Thermoplastic Elastomer (TPE) Production by Hardness (2021-2026) & (Kilotons)
Table 63. World Medical Grade Thermoplastic Elastomer (TPE) Production by Hardness (2027-2032) & (Kilotons)
Table 64. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Hardness (2021-2026) & (USD Million)
Table 65. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Hardness (2027-2032) & (USD Million)
Table 66. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Hardness (2021-2026) & (US$/Ton)
Table 67. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Hardness (2027-2032) & (US$/Ton)
Table 68. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Medical Grade Thermoplastic Elastomer (TPE) Production by Application (2021-2026) & (Kilotons)
Table 70. World Medical Grade Thermoplastic Elastomer (TPE) Production by Application (2027-2032) & (Kilotons)
Table 71. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Application (2021-2026) & (USD Million)
Table 72. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Application (2027-2032) & (USD Million)
Table 73. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Application (2021-2026) & (US$/Ton)
Table 74. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Application (2027-2032) & (US$/Ton)
Table 75. Kraiburg TPE Basic Information, Manufacturing Base and Competitors
Table 76. Kraiburg TPE Major Business
Table 77. Kraiburg TPE Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 78. Kraiburg TPE Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market

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Share (2021-2026)
Table 79. Kraiburg TPE Recent Developments/Updates
Table 80. Kraiburg TPE Competitive Strengths & Weaknesses
Table 81. RTP Company Basic Information, Manufacturing Base and Competitors
Table 82. RTP Company Major Business
Table 83. RTP Company Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 84. RTP Company Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. RTP Company Recent Developments/Updates
Table 86. RTP Company Competitive Strengths & Weaknesses
Table 87. BASF Basic Information, Manufacturing Base and Competitors
Table 88. BASF Major Business
Table 89. BASF Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 90. BASF Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. BASF Recent Developments/Updates
Table 92. BASF Competitive Strengths & Weaknesses
Table 93. Borealis Basic Information, Manufacturing Base and Competitors
Table 94. Borealis Major Business
Table 95. Borealis Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 96. Borealis Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Borealis Recent Developments/Updates
Table 98. Borealis Competitive Strengths & Weaknesses
Table 99. Teknor Apex Basic Information, Manufacturing Base and Competitors
Table 100. Teknor Apex Major Business
Table 101. Teknor Apex Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 102. Teknor Apex Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Teknor Apex Recent Developments/Updates
Table 104. Teknor Apex Competitive Strengths & Weaknesses
Table 105. Tosaf Basic Information, Manufacturing Base and Competitors
Table 106. Tosaf Major Business

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Table 107. Tosaf Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 108. Tosaf Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Tosaf Recent Developments/Updates
Table 110. Tosaf Competitive Strengths & Weaknesses
Table 111. Kuraray Basic Information, Manufacturing Base and Competitors
Table 112. Kuraray Major Business
Table 113. Kuraray Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 114. Kuraray Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Kuraray Recent Developments/Updates
Table 116. Kuraray Competitive Strengths & Weaknesses
Table 117. Avient Basic Information, Manufacturing Base and Competitors
Table 118. Avient Major Business
Table 119. Avient Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 120. Avient Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Avient Recent Developments/Updates
Table 122. Avient Competitive Strengths & Weaknesses
Table 123. Celanese Basic Information, Manufacturing Base and Competitors
Table 124. Celanese Major Business
Table 125. Celanese Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 126. Celanese Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Celanese Recent Developments/Updates
Table 128. Celanese Competitive Strengths & Weaknesses
Table 129. Arkema Basic Information, Manufacturing Base and Competitors
Table 130. Arkema Major Business
Table 131. Arkema Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 132. Arkema Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

+357 96 030922
info@marketpublishers.com

Table 133. Arkema Recent Developments/Updates
Table 134. Arkema Competitive Strengths & Weaknesses
Table 135. Hexpol Basic Information, Manufacturing Base and Competitors
Table 136. Hexpol Major Business
Table 137. Hexpol Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 138. Hexpol Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Hexpol Recent Developments/Updates
Table 140. Hexpol Competitive Strengths & Weaknesses
Table 141. Elastocon AB Basic Information, Manufacturing Base and Competitors
Table 142. Elastocon AB Major Business
Table 143. Elastocon AB Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 144. Elastocon AB Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. Elastocon AB Recent Developments/Updates
Table 146. Elastocon AB Competitive Strengths & Weaknesses
Table 147. Elastron Basic Information, Manufacturing Base and Competitors
Table 148. Elastron Major Business
Table 149. Elastron Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 150. Elastron Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. Elastron Recent Developments/Updates
Table 152. Elastron Competitive Strengths & Weaknesses
Table 153. Enplast Americas Basic Information, Manufacturing Base and Competitors
Table 154. Enplast Americas Major Business
Table 155. Enplast Americas Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 156. Enplast Americas Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Enplast Americas Recent Developments/Updates
Table 158. Enplast Americas Competitive Strengths & Weaknesses
Table 159. LIKON Basic Information, Manufacturing Base and Competitors
Table 160. LIKON Major Business

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Table 161. LIKON Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 162. LIKON Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. LIKON Recent Developments/Updates
Table 164. LIKON Competitive Strengths & Weaknesses
Table 165. Zylog Basic Information, Manufacturing Base and Competitors
Table 166. Zylog Major Business
Table 167. Zylog Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 168. Zylog Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Zylog Recent Developments/Updates
Table 170. Zylog Competitive Strengths & Weaknesses
Table 171. Franplast Basic Information, Manufacturing Base and Competitors
Table 172. Franplast Major Business
Table 173. Franplast Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 174. Franplast Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Franplast Recent Developments/Updates
Table 176. Franplast Competitive Strengths & Weaknesses
Table 177. Everlon Basic Information, Manufacturing Base and Competitors
Table 178. Everlon Major Business
Table 179. Everlon Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 180. Everlon Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Everlon Recent Developments/Updates
Table 182. Everlon Competitive Strengths & Weaknesses
Table 183. Phon Tech Basic Information, Manufacturing Base and Competitors
Table 184. Phon Tech Major Business
Table 185. Phon Tech Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 186. Phon Tech Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

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Table 187. Phon Tech Recent Developments/Updates
Table 188. Phon Tech Competitive Strengths & Weaknesses
Table 189. TSRC Basic Information, Manufacturing Base and Competitors
Table 190. TSRC Major Business
Table 191. TSRC Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 192. TSRC Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 193. TSRC Recent Developments/Updates
Table 194. TSRC Competitive Strengths & Weaknesses
Table 195. Polyrocks Chemical Basic Information, Manufacturing Base and Competitors
Table 196. Polyrocks Chemical Major Business
Table 197. Polyrocks Chemical Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 198. Polyrocks Chemical Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 199. Polyrocks Chemical Recent Developments/Updates
Table 200. Polyrocks Chemical Competitive Strengths & Weaknesses
Table 201. Wynca Basic Information, Manufacturing Base and Competitors
Table 202. Wynca Major Business
Table 203. Wynca Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 204. Wynca Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 205. Wynca Recent Developments/Updates
Table 206. Wynca Competitive Strengths & Weaknesses
Table 207. Tairuifeng New Materials Basic Information, Manufacturing Base and Competitors
Table 208. Tairuifeng New Materials Major Business
Table 209. Tairuifeng New Materials Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 210. Tairuifeng New Materials Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 211. Tairuifeng New Materials Recent Developments/Updates
Table 212. Tairuifeng New Materials Competitive Strengths & Weaknesses
Table 213. ATP Polymer Technology Basic Information, Manufacturing Base and Competitors

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Table 214. ATP Polymer Technology Major Business
Table 215. ATP Polymer Technology Medical Grade Thermoplastic Elastomer (TPE) Product and Services
Table 216. ATP Polymer Technology Medical Grade Thermoplastic Elastomer (TPE) Production (Kilotons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 217. ATP Polymer Technology Recent Developments/Updates
Table 218. ATP Polymer Technology Competitive Strengths & Weaknesses
Table 219. Global Key Players of Medical Grade Thermoplastic Elastomer (TPE) Upstream (Raw Materials)
Table 220. Global Medical Grade Thermoplastic Elastomer (TPE) Typical Customers
Table 221. Medical Grade Thermoplastic Elastomer (TPE) Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Medical Grade Thermoplastic Elastomer (TPE) Picture
Figure 2. World Medical Grade Thermoplastic Elastomer (TPE) Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Medical Grade Thermoplastic Elastomer (TPE) Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032) & (Kilotons)
Figure 5. World Medical Grade Thermoplastic Elastomer (TPE) Average Price (2021-2032) & (US$/Ton)
Figure 6. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Region (2021-2032)
Figure 7. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Region (2021-2032)
Figure 8. North America Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032) & (Kilotons)
Figure 9. Europe Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032) & (Kilotons)
Figure 10. China Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032) & (Kilotons)
Figure 11. Japan Medical Grade Thermoplastic Elastomer (TPE) Production (2021-2032) & (Kilotons)
Figure 12. Medical Grade Thermoplastic Elastomer (TPE) Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 15. World Medical Grade Thermoplastic Elastomer (TPE) Consumption Market Share by Region (2021-2032)
Figure 16. United States Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 17. China Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 18. Europe Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 19. Japan Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)

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Figure 20. South Korea Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 21. ASEAN Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 22. India Medical Grade Thermoplastic Elastomer (TPE) Consumption (2021-2032) & (Kilotons)
Figure 23. Producer Shipments of Medical Grade Thermoplastic Elastomer (TPE) by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Medical Grade Thermoplastic Elastomer (TPE) Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Medical Grade Thermoplastic Elastomer (TPE) Markets in 2025
Figure 26. United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Medical Grade Thermoplastic Elastomer (TPE) Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Market Share 2025
Figure 30. China Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Medical Grade Thermoplastic Elastomer (TPE) Production Market Share 2025
Figure 32. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Type in 2025
Figure 34. TPS
Figure 35. TPU
Figure 36. TPV
Figure 37. COPE
Figure 38. PEBA
Figure 39. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Type (2021-2032)
Figure 40. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Type (2021-2032)
Figure 41. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Type (2021-2032) & (US$/Ton)

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Figure 42. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Processing Method, (USD Million), 2021 & 2025 & 2032
Figure 43. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Processing Method in 2025
Figure 44. Injection Molding Grade
Figure 45. Extrusion Grade
Figure 46. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Processing Method (2021-2032)
Figure 47. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Processing Method (2021-2032)
Figure 48. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Processing Method (2021-2032) & (US$/Ton)
Figure 49. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Hardness, (USD Million), 2021 & 2025 & 2032
Figure 50. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Hardness in 2025
Figure 51. Shore A 0–30
Figure 52. Shore A 30–60
Figure 53. Shore A 60–95
Figure 54. Others
Figure 55. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Hardness (2021-2032)
Figure 56. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Hardness (2021-2032)
Figure 57. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Hardness (2021-2032) & (US$/Ton)
Figure 58. World Medical Grade Thermoplastic Elastomer (TPE) Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 59. World Medical Grade Thermoplastic Elastomer (TPE) Production Value Market Share by Application in 2025
Figure 60. Breathing Tubing
Figure 61. Cathetering Tubes
Figure 62. Syringe Seals
Figure 63. Medical Connectors
Figure 64. Soft-Touch Coating For Medical Devices
Figure 65. Others
Figure 66. World Medical Grade Thermoplastic Elastomer (TPE) Production Market Share by Application (2021-2032)
Figure 67. World Medical Grade Thermoplastic Elastomer (TPE) Production Value

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Market Share by Application (2021-2032)
Figure 68. World Medical Grade Thermoplastic Elastomer (TPE) Average Price by Application (2021-2032) & (US$/Ton)
Figure 69. Medical Grade Thermoplastic Elastomer (TPE) Industry Chain
Figure 70. Medical Grade Thermoplastic Elastomer (TPE) Procurement Model
Figure 71. Medical Grade Thermoplastic Elastomer (TPE) Sales Model
Figure 72. Medical Grade Thermoplastic Elastomer (TPE) Sales Channels, Direct Sales, and Distribution
Figure 73. Methodology
Figure 74. Research Process and Data Source

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