

Global Polyurethane Shoe Sole Prepolymers Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Polyurethane Shoe Sole Prepolymers market size was valued at US\$ 1911 million in 2025 and is forecast to a readjusted size of US\$ 2654 million by 2032 with a CAGR of 4.8% during review period.

Polyurethane shoe sole prepolymers come in a wide variety, including vulcanized rubber, PVC (polyvinyl chloride), EVA (ethylene-vinyl acetate copolymer), TPR (thermoplastic rubber), and polyurethane (PU). Different soles select appropriate raw materials based on functional requirements, or achieve specific properties through blending.

Polyurethane shoe sole prepolymers are end-NCO prepolymers synthesized from polyester or polyether polyols and MDI (toluene diisocyanate). They combine the properties of rubber and plastics, offering advantages such as lightweight, abrasion resistance, good elasticity, comfort, and slip resistance. They are widely used in the production of high-end shoe soles, cushioning insoles, adhesives, and functional shoe soles. Upstream raw materials mainly include MDI and polyester/polyether polyols, while downstream customers include major shoe manufacturers and internationally renowned sports brands such as Nike, Adidas, Skechers, Asics, and Li-Ning. Compared to other shoe sole materials, polyurethane (PU) raw materials exhibit superior performance in terms of lightweight, abrasion resistance, elasticity, and comfort, and can be formulated to meet the needs of different functional shoe soles.

In 2025, the global production of polyurethane shoe sole raw materials was approximately 1.1454 million tons, with a unit price of approximately US\$1,621.473 per ton and a gross profit margin of approximately 18.1%. Some companies had an annual

production capacity of 55,000 tons, with a capacity utilization rate of 67.8%.

As the global footwear consumer market moves towards functionality, comfort, and lightweight design, polyurethane shoe soles have become the mainstream choice for sole materials due to their superior abrasion resistance, elasticity, cushioning performance, and design flexibility. The expansion of niche markets such as athletic shoes, casual shoes, and safety shoes, especially driven by the trend of middle-class consumption upgrading in the Asia-Pacific, North America, and Europe, continues to drive the growth of end-user demand for polyurethane raw materials. PU shoe sole materials not only hold a significant share in the traditional footwear sector but also demonstrate growth potential in emerging niche markets such as high-performance running shoes and outdoor shoes. As consumers demand higher levels of comfort and durability, manufacturers are increasingly adopting higher-performance polyurethane system raw materials to optimize the performance of end products.

Despite the broad market prospects, fluctuations in raw material costs and supply chain instability are among the main risks hindering the industry's development. The prices of key precursors for polyurethane shoe sole raw materials, such as isocyanates and polyols, are significantly affected by fluctuations in the oil market. This uncertainty in raw material costs compresses the profit margins of downstream manufacturers. Simultaneously, stricter regulations on environmental protection and low volatile organic compound (VOC) emissions in some regions globally are forcing manufacturers to invest more resources in formulation innovation and emission control, placing cost and compliance pressures on the industry.

The diversified demand landscape of the footwear industry is shaping a trend towards market segmentation in polyurethane shoe sole raw materials. With the increasing influence of athleisure in global popular culture, consumers are increasingly demanding lightweight, highly elastic, and weather-resistant soles. This trend is particularly evident in the athletic and outdoor casual footwear markets, driving raw material manufacturers to offer higher-performance formulation combinations to meet customized needs. Furthermore, the adoption of environmentally friendly and sustainable materials is also driving the evolution of polyurethane shoe sole raw materials towards more environmentally friendly, low-VOC formulations.

This report is a detailed and comprehensive analysis for global Polyurethane Shoe Sole Prepolymers market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as

well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Polyurethane Shoe Sole Prepolymers market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Polyurethane Shoe Sole Prepolymers market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Polyurethane Shoe Sole Prepolymers market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Polyurethane Shoe Sole Prepolymers market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Polyurethane Shoe Sole Prepolymers

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Polyurethane Shoe Sole Prepolymers market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BASF SE, Covestro, Huntsman, Dow, Lubrizol, Lanxess, INOAC, Manali Petrochemicals Limited, Coim Group, Dongsung Chemical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Polyurethane Shoe Sole Prepolymers market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Low Hardness?35-50?

Medium Hardness?50-65?

High Hardness?65-80?

Others?>80?

Market segment by Density

Low Density?0.25-0.35 g/cm??

Medium Density?0.35-0.45 g/cm??

High Density?0.45-0.6 g/cm??

Market segment by Structure

Outsole

Midsole

Insole

Market segment by Application

Casual Shoes

Sports Shoes

Dress Shoes

Work/Safety Shoes

Major players covered

BASF SE

Covestro

Huntsman

Dow

Lubrizol

Lanxess

INOAC

Manali Petrochemicals Limited

Coim Group

Dongsung Chemical

Samsung Polymer

Huafon Group

Xuchuan Chemical (Suzhou) Co., Ltd.

Zhejiang Hengtaiyuan PU Co.,Ltd.

Wuxi Double Elephant

Jiangsu Huada New Material Co., Ltd.

Shanghai Huide Science & Technology Co., Ltd.

Wanhua Chemical Group

Anhui Anli Material Technology Co., Ltd.

Zhejiang Hexin Holdings Co., Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Polyurethane Shoe Sole Prepolymers product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Polyurethane Shoe Sole Prepolymers, with price, sales quantity, revenue, and global market share of Polyurethane Shoe Sole Prepolymers from 2021 to 2026.

Chapter 3, the Polyurethane Shoe Sole Prepolymers competitive situation, sales

quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Polyurethane Shoe Sole Prepolymers breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Polyurethane Shoe Sole Prepolymers market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Polyurethane Shoe Sole Prepolymers.

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