

Global Polyurethane Shoe Sole Prepolymers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polyurethane Shoe Sole Prepolymers market size is expected to reach \$ 2654 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

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 studies the global Polyurethane Shoe Sole Prepolymers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polyurethane Shoe Sole Prepolymers 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 Polyurethane Shoe Sole Prepolymers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polyurethane Shoe Sole Prepolymers total production and demand, 2021-2032, (Kilotons)

Global Polyurethane Shoe Sole Prepolymers total production value, 2021-2032, (USD Million)

Global Polyurethane Shoe Sole Prepolymers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Polyurethane Shoe Sole Prepolymers consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Polyurethane Shoe Sole Prepolymers domestic production, consumption, key domestic manufacturers and share

Global Polyurethane Shoe Sole Prepolymers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Polyurethane Shoe Sole Prepolymers production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Polyurethane Shoe Sole Prepolymers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Polyurethane Shoe Sole Prepolymers 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Polyurethane Shoe Sole Prepolymers market

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 Polyurethane Shoe Sole Prepolymers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Shoe Sole Prepolymers Market, Segmentation by Type:

Low Hardness?35-50?

Medium Hardness?50-65?

High Hardness?65-80?

Others?>80?

Global Polyurethane Shoe Sole Prepolymers Market, Segmentation 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??

Global Polyurethane Shoe Sole Prepolymers Market, Segmentation by Structure:

Outsole

Midsole

Insole

Global Polyurethane Shoe Sole Prepolymers Market, Segmentation by Application:

Casual Shoes

Sports Shoes

Dress Shoes

Work/Safety Shoes

Companies Profiled:

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.

Key Questions Answered:

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

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