

Global Shoe Polyurethane 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 Shoe Polyurethane 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.

There are many types of shoe raw materials, including vulcanized rubber, PVC (polyvinyl chloride), EVA (ethylene-vinyl acetate copolymer), TPR (thermoplastic rubber), and polyurethane (PU). Different shoe soles select appropriate raw materials according to functional requirements, or achieve specific properties through blending.

Shoe Polyurethane Prepolymers are end-NCO prepolymers synthesized from polyester or polyether polyols and MDI (toluene diisocyanate). They combine the properties of rubber and plastics, possessing 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. 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 lightweighting, abrasion resistance, elasticity, and comfort, and can be formulated to meet the needs of different functional shoe soles.

In 2025, the global production of Shoe Polyurethane Prepolymers for footwear is 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 have 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 lightweighting, polyurethane soles have become the mainstream choice for shoe sole materials due to their excellent 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 sole materials not only occupy an important share in the traditional footwear sector but also show growth potential in emerging niche markets such as high-performance running shoes and outdoor shoes. As consumers' demands for comfort and durability increase, manufacturers are inclined to adopt higher-performance polyurethane system raw materials to optimize the performance of end products.

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

Global Shoe Polyurethane 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 Shoe Polyurethane 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 Shoe Polyurethane 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 Shoe Polyurethane 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 Shoe Polyurethane 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

Shoe Polyurethane 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 Shoe Polyurethane Prepolymers product scope, market overview, market estimation caveats and base year.

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

Chapter 3, the Shoe Polyurethane Prepolymers competitive situation, sales

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

Chapter 4, the Shoe Polyurethane 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 Shoe Polyurethane 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 Shoe Polyurethane Prepolymers.

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