

Global Polyurethane Shoe Sole Prepolymers Market Growth 2026-2032

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Abstracts

The global Polyurethane Shoe Sole Prepolymers market size is predicted to grow from US\$ 1817 million in 2025 to US\$ 2566 million in 2032; it is expected to grow at a CAGR of 5.1% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Polyurethane Shoe Sole Prepolymers Industry Forecast" looks at past sales and reviews total world Polyurethane Shoe Sole Prepolymers sales in 2025, providing a comprehensive analysis by region and market sector of projected Polyurethane Shoe Sole Prepolymers sales for 2026 through 2032. With Polyurethane Shoe Sole Prepolymers sales broken

down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Polyurethane Shoe Sole Prepolymers industry.

This Insight Report provides a comprehensive analysis of the global Polyurethane Shoe Sole Prepolymers landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Polyurethane Shoe Sole Prepolymers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Polyurethane Shoe Sole Prepolymers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Polyurethane Shoe Sole Prepolymers and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Polyurethane Shoe Sole Prepolymers.

This report presents a comprehensive overview, market shares, and growth opportunities of Polyurethane Shoe Sole Prepolymers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Low Hardness?35-50?

Medium Hardness?50-65?

High Hardness?65-80?

Others?>80?

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??

Segmentation by Structure:

Outsole

Midsole

Insole

Segmentation by Application:

Casual Shoes

Sports Shoes

Dress Shoes

Work/Safety Shoes

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its

market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Polyurethane Shoe Sole Prepolymers market?

What factors are driving Polyurethane Shoe Sole Prepolymers market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Polyurethane Shoe Sole Prepolymers market opportunities vary by end market size?

How does Polyurethane Shoe Sole Prepolymers break out by Type, by Application?

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