

Global Shoe Polyurethane Prepolymers Market Growth 2026-2032

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Abstracts

The global Shoe Polyurethane 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.

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.

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

world Shoe Polyurethane Prepolymers industry.

This Insight Report provides a comprehensive analysis of the global Shoe Polyurethane 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 Shoe Polyurethane Prepolymers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Shoe Polyurethane Prepolymers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Shoe Polyurethane 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 Shoe Polyurethane Prepolymers.

This report presents a comprehensive overview, market shares, and growth opportunities of Shoe Polyurethane 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 Shoe Polyurethane Prepolymers market?

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

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

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

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

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