

TPE Market by Type (SBC, TPU, TPO, TPV, COPE, PEBA), End Use Industry (Automotive, Building&Construction, Footwear, Wire&Cable, Medical, Engineering), Region (North America, Europe, APAC, South America, MEA) - Global Forecast to 2026

<https://marketpublishers.com/r/TBAC3C2859AEN.html>

Date: April 2021

Pages: 272

Price: US\$ 4,950.00 (Single User License)

ID: TBAC3C2859AEN

Abstracts

The global TPE market size was USD 19.9 billion in 2021 and is projected to reach USD26.3billion by 2026, at a CAGR of 5.7% between 2021 and 2026. Thermoplastic elastomers are a class of polymers having properties of both thermoplastics and elastomers. They are obtained by linking thermoplastics with elastomeric rubbers. Thermoplastic elastomers provide advantages of both plastics and rubber, and hence the new form created by their combination is adaptable in many applications. The high impact and tear strength of thermoplastic elastomers have increased their demand in the automotive and building & construction industries. Thermoplastic elastomers are recyclable, environment-friendly, and safe to use in medical and food packaging applications.

“Automotive:the fastest-growing end use industryof TPE.”

Automotive is the largest application in the TPE market. TPE is used in exterior filler for panels, wipers, rocker panels, body seals, automotive gaskets, door & window handles, other under-the-hood applications. The segment account for about 33% market share in terms of volume in 2020. The sector is in declining phase for past two year (2018-2019) due to global economic slowdown. However, the segment is expected to recover in forecast period. Moreover, focus towards electric and hybrid vehicle will provide new opportunities for TPE manufacturer.

“APAC is estimated to be the fastest-growing market for TPE.”

APAC accounted for the largest share in terms of volume and value of the TPE market in 2020, followed by North America and Europe. The use of TPE is expected to witness the highest growth in the APAC region during the forecast period. The market in this region is driven by the recovery of the automotive sector in China, India, and Southeast Asian countries. Global automobile manufacturers are investing in APAC countries to establish their production plants to enhance their market presence in the region. China is the significant market for automobile and the largest consumer of TPE in the world. The focus towards the development of New Energy Vehicles (NEVs) to reduce carbon footprint will drive the automotive industry in China which will further enhance the demand of TPE during the forecast period.

“TPE market declined in 2020.”

The TPE market in 2020 declined by 18.2%, in terms of volume, compared to 2019 due to the COVID-19 pandemic. The automotive industry is a significant consumer of TPE. The effect of COVID-19 on the automotive industry led to declining car sales and the layoff of employees. The production was halted due to disruption in the supply chain. With the declining production of automobiles, the demand for TPE also decreased.

Extensive primary interviews were conducted to determine and verify the market size for several segments and subsegments and information gathered through secondary research.

The break-up of primary interviews is given below:

By Company Type - Tier 1 – 25%, Tier 2 – 42%, and Tier 3 – 33%

By Designation—C level – 20%, Director level – 30%, and Others* – 50%

By Region—North America— 40%, Europe – 10%, APAC – 20%, South America— 10%, and Middle East & Africa- 20%

Notes: Others include sales, marketing, and product managers.

Tier 1: >USD 1 Billion; Tier 2: USD 500 million–1 Billion; and Tier 3:

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*Details on Business Overview- Impact of COVID-19 on Business Unit, Products Offered, Recent Developments, Winning Imperatives and MnM View (Strategic overview - Focusing on the Specialty Material Business, COVID-19 Measures) might not be captured in case of unlisted companies.

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