Global Thermoplastic Polyurethane Films Market: Information by Type (Polyester, Polyether and Polycaprolactone), by Application (Automotive, Aerospace, Energy, Construction and others), Region (North America, Europe, Asia Pacific, Latin America and the Middle East & Africa) - Forecast till 2025

Market Synopsis

The global thermoplastic polyurethane films market is estimated to reach USD 554.1 million by 2025. Thermoplastic polyurethane (TPU) film have unique properties which find wide application in end-products such as coatings, textile, adhesive, and barrier films. TPU is biodegradable; its environment-friendly nature makes it a suitable application for medical devices; it is used as an alternative to PVC. In addition, thermoplastic polyurethane (TPU) films are used as an insulator, which helps in improving the efficiency of electronic appliances. In vehicles, thermoplastic polyurethane films help to enhance fuel efficiency by reducing the weight of the vehicles, majorly used alternative to metal. In July 2018, Covestro, a leading supplier of polycarbonate and thermoplastic polyurethane films, announced that it was strengthening its film production capacity. Strategic investment of USD 112.16 million has been initiated to meet the growing demand for thermoplastic polyurethane (TPU) films.

TPU is used in the aerospace industry for application in seating components and window glass lamination. The components used in the manufacturing of aircraft require advanced engineering materials. Thus TPU plays major role in the manufacturing of lightweight aircraft components. TPU help to reduce weight as well as enhances the performance of the aircraft. Increase in the manufacturing of aircraft is expected to boost the growth of the global thermoplastic polyurethane films market. The turnover of the aerospace industry in the UK in 2016 was USD 32 billion, and Japan was USD 19 billion. The manufacturing of aircraft in Canada has increased from 18,783,235 in 2017 to 19,742,834 in 2018. These numbers show that the aerospace industry is projected to witness exponential growth in the years to follow, which is expected to fuel the demand for TPU market.

Key Players

Some of the leading players in the global thermoplastic polyurethane films market are Covestro (Germany), Huntsman Corporation (US), 3M (US), BASF SE (Germany), The Lubrizol Corporation (US), DuPont (US), Permali Gloucester Limited (England), ADDEV Materials (France), American Polyfilm, Inc (US), and DSM (Netherlands). The prominent industrial players are expanding their production capacity, entering into partnership and acquisition to generate higher revenue.
Regional Analysis

The global thermoplastic polyurethane films market has been studied across five key regions, namely Asia-Pacific, North America, Latin America, Europe, and the Middle East & Africa.

The aerospace industry leads North America thermoplastic polyurethane films market, increasing application of thermoplastic polyurethane films in the aerospace industry is surging TPU market demand. Also, increasing application of TPU in the construction industry is likely to favor market growth.

The Asia-Pacific thermoplastic polyurethane films market is growing at a phenomenal pace owing to an increase in demand for lightweight materials and films in electric vehicles. Countries such as China, India, Japan, Thailand, Malaysia, and South Korea are contributing major share in revenue generation. The rise in construction activities and high demand for energy in the industrial sector are key factors driving regional growth.

Europe market is led by aerospace and automotive industries. The UK is the largest manufacturers of aircraft in Europe, thus on of the leading countries in Europe. In addition, the trend of manufacturing lightweight vehicles to enhance fuel efficiency and reduce carbon dioxide emission is surging the demand for thermoplastic polyurethane films. Presence of a large number of automotive manufacturers in countries such as Germany, the UK, France, Spain, and Italy is estimated to drive the demand for thermoplastic polyurethane films in the automotive industry.

The Middle East & Africa and Latin America region are likely to witness healthy growth during the forecast period.

Market Segmentation

The global thermoplastic polyurethane films market has been segmented based on type, application, and region. Based on type, the global market is divided into polyester, polyether, and polycaprolactone. The polyester segment is the fastest growing segment owing to rising application in the aerospace industry. Application segment is divided based on automotive, aerospace, energy, construction, and others. The aerospace segment dominates the global thermoplastic polyurethane films market with over 25.3% share.

Intended Audience

- Thermoplastic polyurethane films manufacturers
- Traders and distributors of thermoplastic polyurethane films chemicals
- Research and development institutes
- Potential investors
- Raw material suppliers
- Nationalized laboratories
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