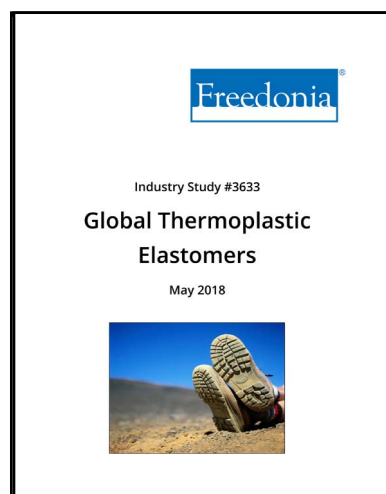




# Global Thermoplastic Elastomers

Industry Study #3633 | May 2018



This study analyzes the \$19.5 billion global thermoplastic elastomer market. It presents historical demand data (2007, 2012, 2017) and forecasts for 2022 by product (styrenic block copolymers, thermoplastic polyolefins, polyolefin elastomers, thermoplastic polyurethanes, thermoplastic vulcanizates, copolyester elastomers) and by market (motor vehicles; consumer goods; asphalt & roofing; adhesives, sealants, & coatings; industrial products). The study also evaluates company market share and analyzes industry competitors including DowDuPont, Exxon Mobil, Kraton, LyondellBasell, Mitsui Chemicals, and Sinopec.

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Table 3-6 | Global Thermoplastic Polyolefin Demand by Region, 2007 – 2022 (thousand metric tons)

Item	2007	Global TPE Market							
Thermoplastic Polyolefin Demand	977.0	<p>'17 - '22 CAGR 4.1%</p>	<p>Key Products Growth Outlook to 2022</p> <table border="1"> <tr> <th>Above Average</th> <th>Average</th> <th>Below Average</th> </tr> <tr> <td> <ul style="list-style-type: none"> <li>POEs</li> <li>TPVs</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>COPEs</li> <li>TPUs</li> </ul> </td> <td> <ul style="list-style-type: none"> <li>SBCs</li> <li>TPOs</li> </ul> </td> </tr> </table>	Above Average	Average	Below Average	<ul style="list-style-type: none"> <li>POEs</li> <li>TPVs</li> </ul>	<ul style="list-style-type: none"> <li>COPEs</li> <li>TPUs</li> </ul>	<ul style="list-style-type: none"> <li>SBCs</li> <li>TPOs</li> </ul>
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North America:	326.0	<p>Top Markets, 2017</p> <table border="1"> <tr> <td>33% Motor Vehicles</td> <td>18% Consumer Goods</td> <td>13% Asphalt &amp; Roofing</td> <td>13% Adhesives, Sealants, &amp; Coatings</td> </tr> </table>	33% Motor Vehicles	18% Consumer Goods	13% Asphalt & Roofing	13% Adhesives, Sealants, & Coatings	<p>Leading Industry Players</p> <ul style="list-style-type: none"> <li>DowDuPont</li> <li>Kraton</li> <li>LyondellBasell</li> <li>Mitsui Chemicals</li> <li>Sinopec</li> </ul>		
33% Motor Vehicles	18% Consumer Goods		13% Asphalt & Roofing	13% Adhesives, Sealants, & Coatings					
United States	264.5								
Canada & Mexico	61.5								
Central & South America	29.0								
Western Europe	233.0								
Eastern Europe	42.5								
Asia/Pacific:	327.5								
China	69.5								
Japan	149.0								
Other Asia/Pacific	109.0								
Africa/Mideast	19.0								
\$/kg	2.20								
Thermoplastic Polyolefins (mil \$)	2150								