
Description: Currently TPU film accounts for very few market share among plastic film industry. But due to its excellent comprehensive performance and natural degradation character, it has become an ideal substitute for most plastic films. Additionally, based on TPU film, a new product of hot melt adhesive-TPU hot melt adhesive film has been developed. Compared with traditional hot melt adhesive based on EVA and synthetic rubber, TPU hot melt adhesive film has good physical performance and can meet the demand for high viscosity as well.

The consumption amount of Chinese TPU film market has reached RMB 2.08 billion in 2014 with a CAGR of 17% from 2008 to 2014. As for TPU hot melt adhesive film, in 2014 the consumption amount has increased by 26% compared with previous year.

Viewing from downstream markets, currently the application of domestic TPU film mainly concentrates in shoe materials, waterproof and moisture permeable fabric, upscale leather products and inflatable materials etc. Shoe material is always the largest consumption market of TPU film in the past few years, in 2014 it consumed nearly 34% of total TPU film sold in China. But its proportion is continuing to decreasing. Due to the increasing demand for sportswear and entry luxury leather products, waterproof and moisture permeable fabric, upscale leather products had and will continue to consume more and more TPU film.

According to each TPU manufacturers’ production plans, In 2014 China newly added about 50 thousand tons of TPU capacity, which mainly came from Huntsman Polyurethanes (China) Ltd, Xuchuan Chemical, Polyl Macromolecule Polymer (Fujian) Co., Ltd and Bangtai Polymeric New-materials Co., Ltd. Among which, a TPU plant with capacity of 21 thousand tons built up by Huntsman has went into operation in February 2014. And based on this plant, Huntsman has become the third largest TPU manufacturer in China.

In 2015, due to the slowed economic development, orders from terminal market has reduced. On one hand, the supply from raw material market continued to increase, which lead to prominent imbalance between supply and demand. On the other hand, shoe industry has gradually transferred to Southeast Asia, domestic output has significant decrease (the same situation for synthetic leather).

As for prices, oversupply of TPU raw materials market is obviously worsen. The whole upstream market is under de-stocking situation. The fall in raw material market has directly affected TPU market, especially for general grade TPU, many manufacturers had forced to fight in the price war.

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