

Liquid Silicone Rubber (LSR) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-02 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Liquid Silicone Rubber (LSR) Market Analysis

The liquid silicone rubber market size reached 310.61 kilotons in 2025 and is projected to expand to 435.24 kilotons by 2030, reflecting a 6.98% CAGR over 2025-2030. Rising demand for biocompatible materials in medical devices, premium baby products, and ultra-high-voltage electric-vehicle (EV) battery packs sustains this growth trajectory. Asia-Pacific dominates current consumption on the back of electronics and automotive manufacturing, while healthcare innovation is accelerating adoption in North America and Europe. Liquid injection molding (LIM) remains the preferred processing technology because it delivers tight tolerances, minimal flash, and high output rates.

Global Liquid Silicone Rubber (LSR) Market Trends and Insights

Increasing Demand From the Healthcare Industry

Hospitals and device makers specify medical-grade formulations because the material meets ISO 10993 cytotoxicity and USP Class VI criteria, resists gamma and steam sterilization, and supports complex geometries with undercuts. Recent breakthroughs enable multi-drug elution from a single implant, allowing physicians to tailor release profiles for oncology and pain-management therapies. Compression-set resistance extends implant life, lowering revision-surgery risk and total cost of care. Clean-room LIM has become routine for catheter hubs and micro-valves, driven by FDA expectations for traceability and tighter particulate limits. These factors together lift global specification rates and help propel the liquid silicone rubber market toward higher-margin

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

medical segments.

Rising Demand From the Baby Care Industry

Caregivers increasingly favor pacifiers, teething rings, and feeding bottles that contain no plasticizers, BPA, or latex proteins. Liquid silicone rubber maintains elasticity after hundreds of dishwasher or sterilization cycles, giving brands a clear durability advantage over TPE alternatives. Hypoallergenic and odor-neutral traits align with strict international toy-safety directives, while vibrant pigmentation options help premium lines stand out on retail shelves. Producer innovation-such as 100% food-grade infant toothbrushes-illustrates how this niche keeps expanding into everyday hygiene items. Together, these trends enlarge the consumer base and lift revenue density inside the liquid silicone rubber market.

High Cost of Liquid Silicone Rubber Products

Dedicated dosing pumps, closed-loop temperature control, and plunger-type injection machines inflate capital outlays relative to thermoplastic molding. Added-value features-medical purity, food-contact certification, or flame-retardancy packages-increase formulation prices by 25%-60% versus commodity elastomers. Process integration sensors provide cycle-time savings and scrap reduction but require upfront investment in Industry 4.0 hardware. Budget-constrained segments such as personal-care dispensers sometimes switch to modified TPEs, dragging near-term growth. Producers are countering with higher cavity molds, predictive maintenance platforms, and expanded regional compounding to shrink freight costs, gradually easing this brake on the liquid silicone rubber market.

Other drivers and restraints analyzed in the detailed report include:

Demand for EV Battery Sealing / Growing Utilization From the Electronics Industry / Recycling Challenges for Liquid Silicone Rubber /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Industrial grade maintained the lion's share at 47.38% in 2024, delivering cost-effective performance for seals, grommets, and keypad housings across diverse industries. High tear strength and oil resistance underpin its suitability for under-hood automotive parts and consumer-electronics buttons, ensuring stable baseline demand inside the liquid silicone rubber market.

Medical/implant grade is advancing at a 7.15% CAGR as minimally invasive therapies gain traction globally. United States FDA approvals for cardiac leads and neuromodulation implants frequently cite low extractables data and stable compression-set values made possible by platinum-cured LSR. This premium pricing tier improves overall liquid silicone rubber market size profitability, with top suppliers scaling ISO 13485-certified production cells to meet stringent traceability requirements. Food-contact grade forms a niche growth pocket anchored in reusable baking molds and baby utensils; performance parity after repeated sterilizations positions it as an eco-friendly alternative to single-use plastics.

Liquid Injection Holding held 69.19% in 2024, stemming from fully automated mixing, short cure cycles, and minimal post-processing. Multi-component LIM integrates hard-plastic substrates with soft LSR over-molds in a single shot, cutting assembly time for medical valves and smart-watch straps. These advantages are critical as OEMs chase takt-time reductions and repeatable high yields, reinforcing LIM's status in the liquid silicone rubber market.

Transfer and compression molding retain relevance for very large parts such as industrial diaphragms, where press tonnage

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

rather than cavity count dictates economics. Early additive-manufacturing pilots demonstrate how 3D-printed LSR lattices can tune cushioning in custom prosthetics, hinting at a future bridge between prototype agility and mass-production quality.

The Liquid Silicone Rubber Market Report Segments the Industry by Type (Food-Contact Grade LSR, Industrial Grade LSR, Medical Grade LSR), Processing Method (Liquid Injection Molding, Transfer and Compression Molding), Application (Seals, Gaskets and O Rings, Catheters and Medical Tubing, and More), End-User Industry (Healthcare and Medical Devices, Automotive, and More), and Geography (Asia-Pacific, North America, and More).

Geography Analysis

Asia-Pacific held 53.96% of global volume in 2024, with China accounting for more than half of regional consumption. Expansions by Wynca Tinyo and Jiangsu Tianchen signal a shift toward local upstream integration that lowers feedstock costs and secures supply continuity. Government incentives for new-energy vehicles elevate LSR demand in battery cooling pads and cell-module gaskets, cementing the region's influence on the liquid silicone rubber market.

North America ranks second, anchored by high-purity medical-device production clusters in Minnesota, California, and Mexico's Bajio corridor. Recent capacity additions-such as Datwyler's two-component molding lines-shorten lead times for U.S. and Canadian OEMs while shielding them from freight volatility. Aerospace tier-ones in Washington and Alabama specify flame-retardant grades for cabin and engine seals, tapping LSR's broad thermal window to meet weight-saving goals.

Europe maintains leadership in process innovation and sustainability. German machine builders continuously refine dosing precision to shrink scrap rates, and Italian mold-makers pioneer conformal-cooling layouts that lower cycle times. The European Commission's focus on circularity spurs R&D into chemical recycling ventures like New Dawn Silicones, foreshadowing a future where closed-loop systems unlock additional growth channels for the liquid silicone rubber market.

List of Companies Covered in this Report:

Avantor, Inc. / CHT Germany GmbH / Dow / DuPont / Elkem ASA / Jiangsu Tianchen New Material Co. Ltd / KCC SILICONE CORPORATION / Momentive / RICO Elastomere Projecting GmbH / RICO GROUP GmbH / Shin-Etsu Chemical Co. Ltd / Stockwell Elastomerics Inc. / Trelleborg Group / Wacker Chemie AG / Wynca Tinyo Silicone Co., Ltd. /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions and Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.2 Market Drivers

4.2.1 Increasing Demand From the Healthcare Industry

4.2.2 Rising Demand From the Baby Care Industry due to its High Biocompatibility

4.2.3 Demand for Ultra-High-Voltage EV Battery Sealing Drives Automotive Grade Adoption

4.2.4 Growing Utilization from the Electronics Industry due to its Unique Properties

4.2.5 Increasing Adoption in the Aerospace Industry Driven by Light weighting Targets

4.3 Market Restraints

4.3.1 High Cost of Liquid Silicone Rubber Products

4.3.2 Low-cost Competition from Novel TPEs in Consumer Goods

4.3.3 Recycling Challenges for Liquid Silicone Rubber

4.4 Value Chain Analysis

4.5 Porter's Five Forces

4.5.1 Bargaining Power of Suppliers

4.5.2 Bargaining Power of Buyers

4.5.3 Threat of New Entrants

4.5.4 Threat of Substitutes

4.5.5 Degree of Competition

5 Market Size and Growth Forecasts (Volume)

5.1 By Type

5.1.1 Industrial Grade LSR

5.1.2 Medical Grade LSR

5.1.3 Food-Contact Grade LSR

5.2 By Processing Method

5.2.1 Liquid Injection Molding

5.2.2 Transfer and Compression Molding

5.3 By Application

5.3.1 Seals, Gaskets and O Rings

5.3.2 Catheters and Medical Tubing

5.3.3 Electrical Connectors and Housings

5.3.4 Teats, Soothers and Infant Feeding

5.3.5 Wearable and Implantable Drug Delivery Systems

5.4 By End-use Industry

5.4.1 Healthcare and Medical Devices

5.4.2 Automotive

5.4.3 Electrical and Electronics

5.4.4 Consumer Goods

5.4.5 Beauty and Personal Care

5.4.6 Other End-user Industries(Industrial Machinery and Seals, etc.)

5.5 By Geography

5.5.1 Asia Pacific

5.5.1.1 China

5.5.1.2 India

5.5.1.3 Japan

5.5.1.4 South Korea

5.5.1.5 ASEAN Countries

5.5.1.6 Rest of Asia Pacific

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.5.2 North America
 - 5.5.2.1 United States
 - 5.5.2.2 Canada
 - 5.5.2.3 Mexico
- 5.5.3 Europe
 - 5.5.3.1 Germany
 - 5.5.3.2 United Kingdom
 - 5.5.3.3 France
 - 5.5.3.4 Italy
 - 5.5.3.5 Spain
 - 5.5.3.6 Rest of Europe
- 5.5.4 South America
 - 5.5.4.1 Brazil
 - 5.5.4.2 Argentina
 - 5.5.4.3 Rest of South America
- 5.5.5 Middle East and Africa
 - 5.5.5.1 Saudi Arabia
 - 5.5.5.2 South Africa
 - 5.5.5.3 Rest of Middle East and Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share (%)/Ranking Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

6.4.1 Avantor, Inc.

6.4.2 CHT Germany GmbH

6.4.3 Dow

6.4.4 DuPont

6.4.5 Elkem ASA

6.4.6 Jiangsu Tianchen New Material Co. Ltd

6.4.7 KCC SILICONE CORPORATION

6.4.8 Momentive

6.4.9 RICO Elastomere Projecting GmbH

6.4.10 RICO GROUP GmbH

6.4.11 Shin-Etsu Chemical Co. Ltd

6.4.12 Stockwell Elastomerics Inc.

6.4.13 Trelleborg Group

6.4.14 Wacker Chemie AG

6.4.15 Wynca Tyny Silicone Co., Ltd.

7 Market Opportunities and Future Outlook

7.1 White-space and Unmet-Need Assessment

7.2 Increasing Advancements in Miniaturization and Smart Device Integration

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Liquid Silicone Rubber (LSR) - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-02 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-31"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

