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Stretchable Electronics Market Research Report - Forecast till 2032

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Description:

Global Stretchable Electronics Market Overview:

Stretchable Electronics Market Size was valued at USD 0.5 Billion in 2023. The Stretchable Electronics industry is projected to grow from USD 0.5813 Billion in 2024 to USD 3.04 Billion by 2032, exhibiting a compound annual growth rate (CAGR) of 22.97% during the forecast period (2024 - 2032). The developments in the materials and assembly techniques, miniaturization of electronic products for better operational speed, and the growing of customers in the electronics industry are the key market drivers expanding the market growth.

Global Stretchable Electronics Market Overview
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Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Stretchable Electronics Market Trends

Increasing demand for bio-integrated devices is driving the market growth

The market CAGR of the stretchable electronics market can be attributed to the growing demand for bio-integrated devices, especially from developed economies. The advancements in soft robotics are also likely to assist the market growth as stretchable electronics can serve as building blocks for soft robotics. Furthermore, the growing adoption of stretchable electronics technology in wearable devices and smartphones is expected to aid the market growth. As a result, the Stretchable Electronics market will likely grow at an impressive pace over the forecast period.

The market is growing owing to its stretchable and flexible properties. The flexibility feature facilitates its utilization in various substrates such as plastics, flex glass, and paper. The growing demand for several consumer and industrial products that are uniquely designed and the growing usage of several innovative materials in consumer goods manufacturing is boosting the demand for stretchable electronics across the globe. The growing demand for various wearable devices is augmenting the growth of the stretchable electronics market. The ability of stretchable electronics to adapt to various shapes has fostered its adoption in manufacturing various wearable devices across the globe. The growing sales of the Internet of Things (IoT) devices across the globe are positively contributing to market development. The growing demand for compact and innovative smart consumer electronics among global consumers is expected to drive the stretchable electronics market revenue.

The growing complexities in the designs of several electronic products, such as smartphones, laptops, tablets, and smartwatches, propel the adoption of stretchable electronics in manufacturing electronic products. There are wider varieties of devices produced across various verticals, such as healthcare, military, aerospace, and various others, which promotes the use of stretchable electronics to produce different types of flexible and compact electronic devices. The ongoing projects regarding developing several smart cities in various countries are estimated to boost the demand for stretchable electronics in the forthcoming years. Moreover, the rising penetration of LEDs and OLEDs is significantly driving the market's growth, as LEDs and OLEDs use stretchable electronics, and hence the market is expected to grow rapidly.

Stretchable Electronics Market Segment Insights:

Stretchable Electronics Component Insights

The Stretchable Electronics Market segmentation, based on components, includes an electroactive polymer, stretchable batteries, stretchable conductors, photovoltaic, and stretchable circuits. The stretchable batteries segment dominated the market, accounting for major market revenue. The proliferation of the technologies like IoT and AI and their adoption in various wearable devices requires compactness and energy efficiency in the products, which fuels the growth of this segment. With the decreasing size of electronic devices, the demand for efficient and long-lasting compact batteries is also increasing rapidly, and hence this segment is expected to offer lucrative growth opportunities during the forecast period.

## Stretchable Electronics Application Insights

The Stretchable Electronics Market segmentation, based on application, includes healthcare, consumer electronics, automotive electronics, aerospace & defense, and others. The healthcare category generated the most income over the forecast period. This is attributed to the rising investments in the research and development of various medical equipment such as patient monitoring, self-monitoring, and wearable medical devices. The rising healthcare expenditure, coupled with the rising burden of diseases, is fostering the adoption of innovative and technologically advanced healthcare devices across healthcare units around the globe over the forecast period.

**Figure 1: Stretchable Electronics Market, by Application, 2022 & 2032 (USD billion)**

Stretchable Electronics Market, by Application, 2022 & 2032

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

## Stretchable Electronics Regional Insights

By Region, the study provides market insights into North America, Europe, Asia-Pacific, and the Rest of the World. The Asia Pacific stretchable electronics market will dominate this market, owing to the increasing popularity of stretchable bio-batteries and organic solar cells, growing investments in soft robotics with touch-sensitive e-skins, and the increasing and high adoption of consumer electronic products. Moreover, China stretchable electronics market held the largest market share, and India stretchable electronics market was the fastest-growing market in the Asia-Pacific region.

Further, the major countries studied in the market report are The U.S., Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

**Figure 2: Stretchable Electronics Market SHARE BY REGION 2022 (%)**

Stretchable Electronics Market SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Europe stretchable electronics market accounts for the second-largest market share due to the growing demand for portable renewable energy resources, the rising population, and the growing need for effective and accurate monitoring of physical conditions is further anticipated to propel the growth of the stretchable electronics market in the region in the coming years. Further, the German stretchable electronics market held the largest market share, and the UK stretchable electronics market was the fastest-growing market in the European region.

The North America stretchable electronics market is expected to grow at the fastest CAGR from 2024 to 2032. This is due to the extensive adoption of new technology, the increasing investments in building and developing organic stretchable photovoltaic cells, touch sense eskin, and IoT, and the growing need for wearable technologies. Furthermore, several institutions are increasing research and development and the occurrence of leading developers and competitors of stretchable electronics technology. Moreover, China stretchable electronics market held the largest market share, and the Indian stretchable electronics market was the fastest-growing market in the North America region.

## Stretchable Electronics Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the stretchable electronics market grow even more. Market participants are also undertaking various strategic activities to expand their global footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. The stretchable electronics industry must offer cost-effective items to expand and survive in a more competitive and rising market climate.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers use in the global stretchable electronics industry to benefit clients and increase the market sector. Major players in the stretchable electronics market, including Forciot Ltd, RISE Acreo, SRI INTERNATIONAL, AVERY DENNISON CORPORATION, CAMBRIOS, Canatu Oy, GCell, Georgia Institute of Technology, and others, are attempting to increase market demand by investing in research and development operations.

IDUN Technologies integrates neuroscience into simple product designs, enabling connected devices to understand the emotional needs of people, providing for happier and more fulfilling product experiences. IDUN achieves this by delivering the full neurofeedback value chain from electrode manufacturing to product design integration. This allows an individual's brain waves to be comfortably characterized throughout the day to understand their unique emotional needs. Through the IDUN API, actional inputs are sent to connected devices, providing more interactive and fulfilling product experiences. In 2019, IDUN Technologies announced the inauguration of Dryode for monitoring the biopotential with high exactness. These products are not immune to water and are prone to motion artifacts.

Toppan Inc, formerly Toppan Printing Co Ltd, offers products and services for information and communication, living and industry, and electronics segments. The company product portfolio includes magnetic cards, books and magazines, catalogs, photomasks, plastic molded products, and securities-related documents. It also offers flip chip ball grid array (FC-BGA) substrates, GL films (a transparent barrier film), wallpapers, decor materials, surface treatment films, color filters, and photomasks for semiconductors. The company's key technologies include surface treatment, microfabrication, information processing, and material forming. Toppan is headquartered in Bunkyo-Ku, Tokyo, Japan. In March 2021, Toppan Printing created a flexible thin-film transistor (TFT) that can resist million winding cycles to around a 1 mm radius of curvature and shows benefits for practical application, including an on/off existing ratio of at least 107 with carrier mobility of 10cm<sup>2</sup>/Vs.

## Key Companies in the Stretchable Electronics market include

- Forciot Ltd

- RISE Acreo
- SRI INTERNATIONAL
- AVERY DENNISON CORPORATION
- CAMBRIOS
- Canatu Oy
- GCell
- Georgia Institute of Technology
- Holst Centre
- IMEC
- MC10, Northwestern University
- PowerFilm Solar Inc.
- Shimmer
- DuPont.
- Touchcode
- Verhaert New Products & Services NV
- Apple Inc., NextFlex.
- Palo Alto Research Center Incorporated;
- FINELINE Circuits Limited.
- StretchSense.
- tacterion
- Bainisha cvba
- Leap Technology ApS

## Stretchable Electronics Industry Developments

**January 2022:** LG Display has announced its flexible OLED solutions in vision form, such as the Virtual Ride indoor stationary bicycle and the Media Chair combined entertainment hub, forward of CES 2022.

**June 2021:** Samsung disclosed the development of a fully adjustable OLED display that can adhere to and blend to the skin's surface. To create a flexible display, Samsung created individual OLED pixels that are ridged but sit on a flexible elastomer surface. The relationships between the OLEDs and the traces that attach the display to the driver system are created with stretchable material.

# Stretchable Electronics Market Segmentation:

## Stretchable Electronics Component Outlook

- Electroactive Polymer
- Stretchable Batteries
- Stretchable Conductor
- Photovoltaic
- Stretchable Circuit

## Stretchable Electronics Application Outlook

- Healthcare
- Consumer Electronics
- Automotive Electronics
- Aerospace & Defense
- Others

## Stretchable Electronics Regional Outlook

- North America
  - US
  - Canada
- Europe
  -

Germany

- France

- UK

- Italy

- Spain

- Rest of Europe

- Asia-Pacific

- China

- Japan

- India

- Australia

- South Korea

- Australia

- Rest of Asia-Pacific

- Rest of the World

- Middle East

- Africa

- Latin America

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