

# Global Waterborne Polyurethane Market Size Study & Forecast, by Application, End Use, Product Type, Formulation Type and Regional Forecasts 2025-2035

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## Abstracts

The Global Waterborne Polyurethane Market is valued at approximately USD 2.37 billion in 2024 and is poised to expand at a robust CAGR of over 5.70% during the forecast period from 2025 to 2035. Waterborne polyurethane (WBPU) represents an eco-conscious evolution in polymer chemistry, engineered to replace traditional solvent-based counterparts while maintaining high performance and durability. It is primarily formulated with low volatile organic compounds (VOCs), making it an ideal solution for industries shifting toward sustainable practices. With governments worldwide tightening environmental regulations and consumers increasingly demanding safer and more sustainable products, the momentum behind WBPU has accelerated significantly. Whether it's enhancing the wear resistance in coatings or increasing flexibility in textiles, the versatility of waterborne polyurethane continues to redefine material innovation.

An evident surge in construction activities, automotive refinishing, and furniture manufacturing has dramatically propelled the need for eco-friendly, high-performance coatings and adhesives—core application areas for WBPU. The rising emphasis on green chemistry, coupled with intensifying scrutiny over chemical emissions, has compelled manufacturers to overhaul legacy production lines in favor of waterborne solutions. According to data from the European Coatings Journal, more than 65% of the industrial coatings applied across sectors are now water-based, indicating a rapid transformation in formulation preferences. Moreover, advancements in polymer synthesis techniques are enabling the development of WBPU grades with enhanced chemical resistance, weather durability, and mechanical strength—thereby opening doors to new industrial verticals. Despite these tailwinds, challenges such as relatively higher costs and processing complexities may temper market expansion in certain developing economies during the forecast period.

Regionally, North America currently leads the global Waterborne Polyurethane market landscape, buoyed by robust industrial infrastructure, stringent environmental mandates, and a mature coatings sector. The U.S. Environmental Protection Agency's push for zero-VOC emissions has incentivized widespread adoption of WBPU in everything from building materials to automotive interiors. Meanwhile, Europe follows closely, driven by progressive sustainability initiatives like the EU Green Deal and REACH compliance that favor non-toxic, bio-based chemicals. Asia Pacific, however, is poised to register the highest growth rate over the next decade, fueled by rapid urbanization, rising disposable incomes, and a growing middle-class demand for aesthetically appealing yet environmentally safe consumer products. Countries like China, India, and South Korea are investing heavily in domestic manufacturing capacities while implementing stricter emission norms, which is expected to catalyze the regional demand for waterborne polyurethanes.

Major market players included in this report are:

BASF SE

Covestro AG

The Dow Chemical Company

Huntsman Corporation

Mitsui Chemicals Inc.

DIC Corporation

Lubrizol Corporation

Wanhua Chemical Group Co., Ltd.

Allnex Group

Alberdingk Boley GmbH

DSM Coating Resins

Stahl Holdings B.V.

Hathaway Corporation

Bayer MaterialScience AG

Michelman Inc.

### Global Waterborne Polyurethane Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Application:

*Global Waterborne Polyurethane Market Size Study & Forecast, by Application, End Use, Product Type, Formulation...*

Wood Coatings

Industrial Coatings

Textile Coatings

Paper Coatings

By End Use:

Construction

Automotive

Furniture

Textiles

By Product Type:

Acrylic Waterborne Polyurethane

Aliphatic Waterborne Polyurethane

Aromatic Waterborne Polyurethane

By Formulation Type:

Two-component Systems

One-component Systems

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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