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# Global PFAS-Free Water Repellent Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

https://marketpublishers.com/r/GEC91677B339EN.html
Date: August 2026
Pages: 137
Price: US$ 3,480.00 (Single User License)
ID: GEC91677B339EN

## Abstracts

According to our (Global Info Research) latest study, the global PFAS-Free Water Repellent market size was valued at US$ 450 million in 2025 and is forecast to a readjusted size of US$ 759 million by 2032 with a CAGR of 7.7% during review period.

PFAS-Free Water Repellent Agents refer to functional finishing additives that do not use per- and polyfluoroalkyl substances (PFAS) as the active component and are used to impart water-repellent properties to textiles, nonwoven fabrics, leather, and other flexible substrates. Common systems include paraffin/wax emulsions, silicone-based systems, polyurethane-based systems, acrylic copolymers, dendritic or hyperbranched polymers, and bio-based composite systems. These materials reduce surface energy, form hydrophobic microstructures, or work synergistically with crosslinking systems to enhance wash durability and abrasion resistance. They are mainly used in outdoor apparel, workwear uniforms, home textiles, footwear, bags, and industrial textiles. They are designed to replace conventional C6/C8 fluorinated water-repellent finishes while balancing hand feel, breathability, wash durability, and regulatory compliance. The overall gross margin is approximately 42%.

On the demand side, tightening global PFAS regulations in textiles and consumer products is continuously reshaping the industry. Compliance requirements from brand Restricted Substances Lists (RSLs), OEKO-TEX, bluesign, and ZDHC have transformed PFAS-free water repellents from an optional green alternative into a mandatory supply-chain requirement. At the same time, applications such as outdoor sportswear, workwear, protective clothing, home textiles, and automotive interiors still require durable water and stain repellency, driving large-scale substitution from fluorinated DWR systems to PFAS-free (C0) alternatives.

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On the product side, the current mainstream substitution routes include wax/paraffin-based systems, silicone-based systems, polyurethane-based systems, acrylic-based systems, and dendritic or hyperbranched polymer systems. Competitive focus is shifting from initial water repellency performance to a broader balance of properties, including wash durability, anti-whitening performance, low yellowing, soft hand feel, low-temperature curing requirements, compatibility with textile resins and softeners, and completeness of regulatory documentation. However, PFAS-free systems still show performance gaps in oil repellency and extreme durability, making high-performance blends, crosslinking enhancement, and bio-based differentiation key directions for future development.

From a regional and supply-chain perspective, Europe and the United States are leading the regulatory push and brand adoption cycle, while China, India, and Southeast Asia are?? large-scale textile finishing demand. Local additive suppliers are participating in substitution growth through fast sampling response and cost advantages. Key opportunities are concentrated in outdoor sportswear, workwear, industrial textiles, and nonwoven materials, while key risks include long certification cycles, significant variability across fabric substrates, and increasingly stringent testing requirements for PFAS residues and cross-contamination control.

This report is a detailed and comprehensive analysis for global PFAS-Free Water Repellent market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global PFAS-Free Water Repellent market size and forecasts, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global PFAS-Free Water Repellent market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global PFAS-Free Water Repellent market size and forecasts, by Type and by

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Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/kg), 2021-2032

Global PFAS-Free Water Repellent market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/kg), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for PFAS-Free Water Repellent

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global PFAS-Free Water Repellent market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Archroma, Rudolf, CHT Group, HeiQ, TANATEX Chemicals, Pulcra Chemicals, NICCA Chemical, Bolger & O'Hearn, Sarex Chemicals, Transfar Chemicals, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

PFAS-Free Water Repellent market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Wax and Paraffin-Based Repellents

Silicone-Based Repellents

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Polyurethane-Based Repellents

Acrylic Copolymer-Based Repellents

Dendrimer and Hyperbranched Polymer Repellents

Bio-Based Hybrid Repellents

Market segment by Substrate

Cellulosic Fiber Repellents

Synthetic Fiber Repellents

Blended Fabric Repellents

Wool and Silk Repellents

Leather and Footwear Repellents

Nonwoven Substrate Repellents

Market segment by Durability Performance

Standard Water Repellency

Durable Wash-Resistant Repellency

Industrial Laundering Resistant Repellency

High Water-Column Repellency

Soft-Hand Breathable Repellency

Water and Stain Repellency

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Market segment by Application Process

- Pad-Dry-Cure Agents
- Exhaust Finishing Agents
- Spray Application Agents
- Foam Application Agents
- Crosslinker-Enhanced Systems
- Heat-Reactivatable Aftercare Agents

Market segment by Application

- Outdoor and Sports Apparel
- Workwear and Uniforms
- Casual Apparel
- Home Textiles and Upholstery
- Footwear and Bags
- Technical Textiles and Nonwovens

Major players covered

- Archroma
- Rudolf
- CHT Group
- HeiQ

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TANATEX Chemicals

Pulcra Chemicals

NICCA Chemical

Bolger & O'Hearn

Sarex Chemicals

Transfar Chemicals

Dymatic

Evonik

Schoeller Textiles

Green Theme Technologies

AGS Tex

Applied Textiles

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

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The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe PFAS-Free Water Repellent product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PFAS-Free Water Repellent, with price, sales quantity, revenue, and global market share of PFAS-Free Water Repellent from 2021 to 2026.

Chapter 3, the PFAS-Free Water Repellent competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PFAS-Free Water Repellent breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and PFAS-Free Water Repellent market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of PFAS-Free Water Repellent.

Chapter 14 and 15, to describe PFAS-Free Water Repellent sales channel, distributors, customers, research findings and conclusion.

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