

Global Polyurethane Associative Thickener Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GD330BFF59D5EN.html>

Date: August 2026

Pages: 131

Price: US\$ 4,480.00 (Single User License)

ID: GD330BFF59D5EN

Abstracts

The global Polyurethane Associative Thickener market size is expected to reach \$ 660 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Polyurethane associative thickeners are a class of non-ionic, synthetic associative thickeners used in water-based systems. Their molecules typically consist of hydrophilic polyether segments, urethane linkages, and hydrophobic end groups. In formulations such as water-based coatings, inks, and adhesives, they regulate viscosity, leveling, sag resistance, spatter control, and application feel through mechanisms involving hydrophobic association, adsorption onto latex particles, and polymer network interactions.

Upstream raw materials primarily include polyether polyols (such as polyethylene glycol and polypropylene glycol), isocyanate monomers, hydrophobic monomers (including fatty alcohols, alkylphenol alternatives, and bio-based options), chain extenders, neutralizing/end-capping agents, catalysts, co-solvents, deionized water, preservatives, and defoamers. Polyether segments determine water solubility and basic rheological response; the reaction between isocyanates and hydroxyl groups forms the urethane structure; and hydrophobic end groups determine the strength of association with latex particles, pigments/fillers, and surfactants. Mid-to-high-end products also feature controls on VOCs, APEOs, organotin compounds, odor, active content, freeze-thaw stability, and microbial stability to meet the requirements of low-VOC water-based coatings and high-reliability formulations.

In 2025, global sales volume is approximately 95,000 metric tons, the global average market price is around US\$5,100 per metric ton, and the gross profit margin for major

industry manufacturers ranges from approximately 20% to 35%.

Polyurethane associative thickeners are high-end rheology modifiers used in water-based coatings, adhesives, inks, and certain construction material systems; industry growth is primarily driven by the shift toward water-based formulations, low-VOC and low-odor requirements, and the need for superior decorative qualities and application performance. Compared to traditional systems such as cellulose ethers and alkali-swellable acrylic thickeners, HEUR/PU thickeners excel at enhancing mid-to-high shear viscosity, leveling, film build, spatter resistance, brushability, and pigment compatibility. Consequently, their market penetration continues to rise across architectural coatings, industrial water-based coatings, wood coatings, high-gloss systems, and high-performance emulsion systems. However, adoption faces challenges: the products require precise formulation compatibility and entail higher costs than standard thickeners; they are sensitive to emulsions, surfactants, co-solvents, pigments/fillers, and colorant systems; customer validation cycles are lengthy; and alternative products may be used in cost-sensitive applications.

This report studies the global Polyurethane Associative Thickener production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polyurethane Associative Thickener and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Polyurethane Associative Thickener that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polyurethane Associative Thickener total production and demand, 2021-2032, (Tons)

Global Polyurethane Associative Thickener total production value, 2021-2032, (USD Million)

Global Polyurethane Associative Thickener production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Polyurethane Associative Thickener consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Polyurethane Associative Thickener domestic production, consumption, key domestic manufacturers and share

Global Polyurethane Associative Thickener production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Polyurethane Associative Thickener production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Polyurethane Associative Thickener production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Polyurethane Associative Thickener market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Dow, BASF, Arkema, Elementis, Evonik, BYK, M?NZING, Milliken, ADEKA, SAN NOPCO, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Polyurethane Associative Thickener market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Polyurethane Associative Thickener Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Associative Thickener Market, Segmentation by Type:

Linear Structure

Star Structure

Other

Global Polyurethane Associative Thickener Market, Segmentation by Shear Action:

Low Shear

Medium Shear

High Shear

Global Polyurethane Associative Thickener Market, Segmentation by Solids Content:

35%

Global Polyurethane Associative Thickener Market, Segmentation by Application:

Water-based Coating

Ink

Adhesive

Other

Companies Profiled:

Dow

BASF

Arkema

Elementis

Evonik

BYK

M?NZING

Milliken

ADEKA

SAN NOPCO

Wanhua Chemical

Key Questions Answered:

1. How big is the global Polyurethane Associative Thickener market?
2. What is the demand of the global Polyurethane Associative Thickener market?
3. What is the year over year growth of the global Polyurethane Associative Thickener market?
4. What is the production and production value of the global Polyurethane Associative Thickener market?
5. Who are the key producers in the global Polyurethane Associative Thickener market?
6. What are the growth factors driving the market demand?

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