

Global Polyurethane Dispersion (PUD) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polyurethane Dispersion (PUD) market size is expected to reach \$ 5049 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

Polyurethane Dispersion is a liquid resin material in which polyurethane polymer particles are stably dispersed in water or a low-solvent continuous phase. It is typically supplied as a milky white to translucent liquid. The product combines the flexibility, abrasion resistance, adhesion, film-forming capability, and chemical resistance of polyurethane materials with lower volatile organic compound emissions than conventional solvent-borne polyurethane systems. It is an important functional resin for waterborne coatings, environmentally compliant adhesives, synthetic leather finishing, textile finishing, footwear materials, automotive interiors, wood coatings, and packaging coatings.

From an industrial perspective, the major production and consumption regions for Polyurethane Dispersion include China, Europe, the United States, Japan, South Korea, and Southeast Asia. China has strong scale advantages in general-purpose and medium-to-high-solids products, while suppliers in Europe, the United States, and Japan have stronger technical capabilities in high-performance, low-odor, self-crosslinking, hydrolysis-resistant, non-yellowing, and functionalized resin systems. As environmental regulations become stricter and downstream materials continue to shift toward waterborne technologies, Polyurethane Dispersion is evolving from a general environmentally compliant substitute into a high-performance waterborne polyurethane platform material.

In 2025, global Polyurethane Dispersion production reached approximately 680,000 to

740,000 metric tons, while mainstream industrial-grade products were priced at about USD 4,100 to USD 4,600 per metric ton on an ex-works or FOB-equivalent basis. Driven by rising demand from waterborne coatings, environmentally compliant adhesives, synthetic leather, textile finishing, automotive interiors, and packaging coatings, the PUD market continued to shift toward low-VOC, low-solvent, high-solids, self-crosslinking, and functionalized formulations, with Asia Pacific remaining the largest production and consumption region, while Europe and North America were mainly supported by environmental regulations, high-performance coatings, and industrial material upgrades.

The core opportunity in the global Polyurethane Dispersion market comes from the combined drivers of environmental substitution and performance upgrading. In the past, the primary value of PUD was to replace solvent-borne polyurethane systems and help coatings, adhesives, and surface treatment materials reduce volatile organic compound emissions. The market is now moving toward broader performance requirements, including low odor, high solids, co-solvent-free systems, self-crosslinking chemistry, hydrolysis resistance, non-yellowing performance, soft-touch properties, and adhesion to multiple substrates. Coatings and adhesives remain the most stable demand base, while synthetic leather, textile finishing, automotive interiors, footwear materials, wood coatings, and flexible packaging are driving the transition from general-purpose resins to application-specific, functionalized, and customized resin systems. For customers in branded consumer goods, automotive, furniture, and industrial coatings, PUD is no longer merely a substitute for solvent-borne systems, but a key waterborne polymer material that combines environmental compliance, processing compatibility, and end-use performance.

The main market challenges are concentrated in cost control, formulation validation, and competitive substitution. Fluctuations in isocyanates, polyols, chain extenders, hydrophilic monomers, and functional additives affect margin stability. Downstream requirements vary significantly in particle size, solids content, viscosity, minimum film-forming temperature, soft and hard segment structure, ionic stability, and post-crosslinking performance, requiring suppliers to go through long customer testing and system qualification cycles. At the same time, in applications requiring high chemical resistance, water resistance, weatherability, and durability under extreme operating conditions, PUD still competes with solvent-borne polyurethane, acrylic emulsions, waterborne epoxy, and modified silicone materials. Future growth is more likely to come from lightweight automotive interiors, solvent-free synthetic leather, low-odor home materials, bio-based Polyurethane Dispersion, recyclable packaging coatings, and high-performance textile coatings. Suppliers with strong resin design, application

development, and global customer qualification capabilities are more likely to secure high-value orders.

This report studies the global Polyurethane Dispersion (PUD) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Polyurethane Dispersion (PUD) 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 Dispersion (PUD) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Polyurethane Dispersion (PUD) total production and demand, 2021-2032, (K MT)

Global Polyurethane Dispersion (PUD) total production value, 2021-2032, (USD Million)

Global Polyurethane Dispersion (PUD) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Polyurethane Dispersion (PUD) consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Polyurethane Dispersion (PUD) domestic production, consumption, key domestic manufacturers and share

Global Polyurethane Dispersion (PUD) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Polyurethane Dispersion (PUD) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Polyurethane Dispersion (PUD) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Polyurethane Dispersion (PUD) 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 Covestro AG, BASF SE, Stahl Holdings B.V., Alberdingk Boley GmbH, allnex GmbH, Lamberti S.p.A., Lubrizol Corporation, Hawthaway Corporation, Michelman, Inc., Chase Corporation, 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 Dispersion (PUD) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Dispersion (PUD) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Dispersion (PUD) Market, Segmentation by Type:

Waterborne Dispersion

Solvent Assisted Dispersion

Specialty Low Solvent Dispersion

Global Polyurethane Dispersion (PUD) Market, Segmentation by Ionic Type:

Anionic PUDs

Cationic PUDs

Nonionic PUDs

Others

Global Polyurethane Dispersion (PUD) Market, Segmentation by Product Chemistry:

Polyester Based PUDs

Polyether Based PUDs

Polycarbonate Based PUDs

Others

Global Polyurethane Dispersion (PUD) Market, Segmentation by Raw Material System:

Aromatic Isocyanate Based PUDs

Aliphatic Isocyanate Based PUDs

Bio Based PUDs

Global Polyurethane Dispersion (PUD) Market, Segmentation by Application:

Industrial Manufacturing

Building and Furniture

Automotive and Transportation

Footwear and Consumer Goods

Companies Profiled:

Covestro AG

BASF SE

Stahl Holdings B.V.

Alberdingk Boley GmbH

allnex GmbH

Lamberti S.p.A.

Lubrizol Corporation

Hauthaway Corporation

Michelman, Inc.

Chase Corporation

Sika AG

UBE Corporation

DIC Corporation

Mitsui Chemicals, Inc.

Wanhua Chemical Group Co., Ltd.

Huafon Group Co., Ltd.

Hefei Ketian Waterborne Technology Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Guangzhou SIO New Material Co., Ltd.

Dongsung Chemical Co., Ltd.

Eternal Materials Co., Ltd.

Chansieh Enterprises Co., Ltd.

Pidilite Industries Limited

Texochem Industries

VICHEM Joint Stock Company

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Polyurethane Dispersion (PUD) Introduction
- 1.2 World Polyurethane Dispersion (PUD) Supply & Forecast
 - 1.2.1 World Polyurethane Dispersion (PUD) Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Polyurethane Dispersion (PUD) Production (2021-2032)
 - 1.2.3 World Polyurethane Dispersion (PUD) Pricing Trends (2021-2032)
- 1.3 World Polyurethane Dispersion (PUD) Production by Region (Based on Production Site)
 - 1.3.1 World Polyurethane Dispersion (PUD) Production Value by Region (2021-2032)
 - 1.3.2 World Polyurethane Dispersion (PUD) Production by Region (2021-2032)
 - 1.3.3 World Polyurethane Dispersion (PUD) Average Price by Region (2021-2032)
 - 1.3.4 North America Polyurethane Dispersion (PUD) Production (2021-2032)
 - 1.3.5 Europe Polyurethane Dispersion (PUD) Production (2021-2032)
 - 1.3.6 China Polyurethane Dispersion (PUD) Production (2021-2032)
 - 1.3.7 Japan Polyurethane Dispersion (PUD) Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Polyurethane Dispersion (PUD) Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Polyurethane Dispersion (PUD) Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Polyurethane Dispersion (PUD) Demand (2021-2032)
- 2.2 World Polyurethane Dispersion (PUD) Consumption by Region
 - 2.2.1 World Polyurethane Dispersion (PUD) Consumption by Region (2021-2026)
 - 2.2.2 World Polyurethane Dispersion (PUD) Consumption Forecast by Region (2027-2032)
- 2.3 United States Polyurethane Dispersion (PUD) Consumption (2021-2032)
- 2.4 China Polyurethane Dispersion (PUD) Consumption (2021-2032)
- 2.5 Europe Polyurethane Dispersion (PUD) Consumption (2021-2032)
- 2.6 Japan Polyurethane Dispersion (PUD) Consumption (2021-2032)
- 2.7 South Korea Polyurethane Dispersion (PUD) Consumption (2021-2032)
- 2.8 ASEAN Polyurethane Dispersion (PUD) Consumption (2021-2032)
- 2.9 India Polyurethane Dispersion (PUD) Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Polyurethane Dispersion (PUD) Production Value by Manufacturer (2021-2026)
- 3.2 World Polyurethane Dispersion (PUD) Production by Manufacturer (2021-2026)
- 3.3 World Polyurethane Dispersion (PUD) Average Price by Manufacturer (2021-2026)
- 3.4 Polyurethane Dispersion (PUD) Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Polyurethane Dispersion (PUD) Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Polyurethane Dispersion (PUD) in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Polyurethane Dispersion (PUD) in 2025
- 3.6 Polyurethane Dispersion (PUD) Market: Overall Company Footprint Analysis
 - 3.6.1 Polyurethane Dispersion (PUD) Market: Region Footprint
 - 3.6.2 Polyurethane Dispersion (PUD) Market: Company Product Type Footprint
 - 3.6.3 Polyurethane Dispersion (PUD) Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Polyurethane Dispersion (PUD) Production Value Comparison
 - 4.1.1 United States VS China: Polyurethane Dispersion (PUD) Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Polyurethane Dispersion (PUD) Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Polyurethane Dispersion (PUD) Production Comparison
 - 4.2.1 United States VS China: Polyurethane Dispersion (PUD) Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Polyurethane Dispersion (PUD) Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Polyurethane Dispersion (PUD) Consumption Comparison
 - 4.3.1 United States VS China: Polyurethane Dispersion (PUD) Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Polyurethane Dispersion (PUD) Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Polyurethane Dispersion (PUD) Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Polyurethane Dispersion (PUD) Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Polyurethane Dispersion (PUD) Production Value (2021-2026)

4.4.3 United States Based Manufacturers Polyurethane Dispersion (PUD) Production (2021-2026)

4.5 China Based Polyurethane Dispersion (PUD) Manufacturers and Market Share

4.5.1 China Based Polyurethane Dispersion (PUD) Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Polyurethane Dispersion (PUD) Production Value (2021-2026)

4.5.3 China Based Manufacturers Polyurethane Dispersion (PUD) Production (2021-2026)

4.6 Rest of World Based Polyurethane Dispersion (PUD) Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Polyurethane Dispersion (PUD) Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Polyurethane Dispersion (PUD) Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Waterborne Dispersion

5.2.2 Solvent Assisted Dispersion

5.2.3 Specialty Low Solvent Dispersion

5.3 Market Segment by Type

5.3.1 World Polyurethane Dispersion (PUD) Production by Type (2021-2032)

5.3.2 World Polyurethane Dispersion (PUD) Production Value by Type (2021-2032)

5.3.3 World Polyurethane Dispersion (PUD) Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY IONIC TYPE

6.1 World Polyurethane Dispersion (PUD) Market Size Overview by Ionic Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Ionic Type

6.2.1 Anionic PUDs

6.2.2 Cationic PUDs

6.2.3 Nonionic PUDs

6.2.4 Others

6.3 Market Segment by Ionic Type

6.3.1 World Polyurethane Dispersion (PUD) Production by Ionic Type (2021-2032)

6.3.2 World Polyurethane Dispersion (PUD) Production Value by Ionic Type (2021-2032)

6.3.3 World Polyurethane Dispersion (PUD) Average Price by Ionic Type (2021-2032)

7 MARKET ANALYSIS BY PRODUCT CHEMISTRY

7.1 World Polyurethane Dispersion (PUD) Market Size Overview by Product Chemistry: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Product Chemistry

7.2.1 Polyester Based PUDs

7.2.2 Polyether Based PUDs

7.2.3 Polycarbonate Based PUDs

7.2.4 Others

7.3 Market Segment by Product Chemistry

7.3.1 World Polyurethane Dispersion (PUD) Production by Product Chemistry (2021-2032)

7.3.2 World Polyurethane Dispersion (PUD) Production Value by Product Chemistry (2021-2032)

7.3.3 World Polyurethane Dispersion (PUD) Average Price by Product Chemistry (2021-2032)

8 MARKET ANALYSIS BY RAW MATERIAL SYSTEM

8.1 World Polyurethane Dispersion (PUD) Market Size Overview by Raw Material System: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Raw Material System

8.2.1 Aromatic Isocyanate Based PUDs

8.2.2 Aliphatic Isocyanate Based PUDs

8.2.3 Bio Based PUDs

8.3 Market Segment by Raw Material System

8.3.1 World Polyurethane Dispersion (PUD) Production by Raw Material System (2021-2032)

8.3.2 World Polyurethane Dispersion (PUD) Production Value by Raw Material System (2021-2032)

8.3.3 World Polyurethane Dispersion (PUD) Average Price by Raw Material System (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Polyurethane Dispersion (PUD) Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Industrial Manufacturing

9.2.2 Building and Furniture

9.2.3 Automotive and Transportation

9.2.4 Footwear and Consumer Goods

9.3 Market Segment by Application

9.3.1 World Polyurethane Dispersion (PUD) Production by Application (2021-2032)

9.3.2 World Polyurethane Dispersion (PUD) Production Value by Application (2021-2032)

9.3.3 World Polyurethane Dispersion (PUD) Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Covestro AG

10.1.1 Covestro AG Details

10.1.2 Covestro AG Major Business

10.1.3 Covestro AG Polyurethane Dispersion (PUD) Product and Services

10.1.4 Covestro AG Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Covestro AG Recent Developments/Updates

10.1.6 Covestro AG Competitive Strengths & Weaknesses

10.2 BASF SE

10.2.1 BASF SE Details

10.2.2 BASF SE Major Business

10.2.3 BASF SE Polyurethane Dispersion (PUD) Product and Services

10.2.4 BASF SE Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 BASF SE Recent Developments/Updates

- 10.2.6 BASF SE Competitive Strengths & Weaknesses
- 10.3 Stahl Holdings B.V.
 - 10.3.1 Stahl Holdings B.V. Details
 - 10.3.2 Stahl Holdings B.V. Major Business
 - 10.3.3 Stahl Holdings B.V. Polyurethane Dispersion (PUD) Product and Services
 - 10.3.4 Stahl Holdings B.V. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.3.5 Stahl Holdings B.V. Recent Developments/Updates
 - 10.3.6 Stahl Holdings B.V. Competitive Strengths & Weaknesses
- 10.4 Alberdingk Boley GmbH
 - 10.4.1 Alberdingk Boley GmbH Details
 - 10.4.2 Alberdingk Boley GmbH Major Business
 - 10.4.3 Alberdingk Boley GmbH Polyurethane Dispersion (PUD) Product and Services
 - 10.4.4 Alberdingk Boley GmbH Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.4.5 Alberdingk Boley GmbH Recent Developments/Updates
 - 10.4.6 Alberdingk Boley GmbH Competitive Strengths & Weaknesses
- 10.5 allnex GmbH
 - 10.5.1 allnex GmbH Details
 - 10.5.2 allnex GmbH Major Business
 - 10.5.3 allnex GmbH Polyurethane Dispersion (PUD) Product and Services
 - 10.5.4 allnex GmbH Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.5.5 allnex GmbH Recent Developments/Updates
 - 10.5.6 allnex GmbH Competitive Strengths & Weaknesses
- 10.6 Lamberti S.p.A.
 - 10.6.1 Lamberti S.p.A. Details
 - 10.6.2 Lamberti S.p.A. Major Business
 - 10.6.3 Lamberti S.p.A. Polyurethane Dispersion (PUD) Product and Services
 - 10.6.4 Lamberti S.p.A. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.6.5 Lamberti S.p.A. Recent Developments/Updates
 - 10.6.6 Lamberti S.p.A. Competitive Strengths & Weaknesses
- 10.7 Lubrizol Corporation
 - 10.7.1 Lubrizol Corporation Details
 - 10.7.2 Lubrizol Corporation Major Business
 - 10.7.3 Lubrizol Corporation Polyurethane Dispersion (PUD) Product and Services
 - 10.7.4 Lubrizol Corporation Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.7.5 Lubrizol Corporation Recent Developments/Updates
- 10.7.6 Lubrizol Corporation Competitive Strengths & Weaknesses
- 10.8 Hawthaway Corporation
 - 10.8.1 Hawthaway Corporation Details
 - 10.8.2 Hawthaway Corporation Major Business
 - 10.8.3 Hawthaway Corporation Polyurethane Dispersion (PUD) Product and Services
 - 10.8.4 Hawthaway Corporation Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.8.5 Hawthaway Corporation Recent Developments/Updates
 - 10.8.6 Hawthaway Corporation Competitive Strengths & Weaknesses
- 10.9 Michelman, Inc.
 - 10.9.1 Michelman, Inc. Details
 - 10.9.2 Michelman, Inc. Major Business
 - 10.9.3 Michelman, Inc. Polyurethane Dispersion (PUD) Product and Services
 - 10.9.4 Michelman, Inc. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.9.5 Michelman, Inc. Recent Developments/Updates
 - 10.9.6 Michelman, Inc. Competitive Strengths & Weaknesses
- 10.10 Chase Corporation
 - 10.10.1 Chase Corporation Details
 - 10.10.2 Chase Corporation Major Business
 - 10.10.3 Chase Corporation Polyurethane Dispersion (PUD) Product and Services
 - 10.10.4 Chase Corporation Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.10.5 Chase Corporation Recent Developments/Updates
 - 10.10.6 Chase Corporation Competitive Strengths & Weaknesses
- 10.11 Sika AG
 - 10.11.1 Sika AG Details
 - 10.11.2 Sika AG Major Business
 - 10.11.3 Sika AG Polyurethane Dispersion (PUD) Product and Services
 - 10.11.4 Sika AG Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.11.5 Sika AG Recent Developments/Updates
 - 10.11.6 Sika AG Competitive Strengths & Weaknesses
- 10.12 UBE Corporation
 - 10.12.1 UBE Corporation Details
 - 10.12.2 UBE Corporation Major Business
 - 10.12.3 UBE Corporation Polyurethane Dispersion (PUD) Product and Services
 - 10.12.4 UBE Corporation Polyurethane Dispersion (PUD) Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.12.5 UBE Corporation Recent Developments/Updates

10.12.6 UBE Corporation Competitive Strengths & Weaknesses

10.13 DIC Corporation

10.13.1 DIC Corporation Details

10.13.2 DIC Corporation Major Business

10.13.3 DIC Corporation Polyurethane Dispersion (PUD) Product and Services

10.13.4 DIC Corporation Polyurethane Dispersion (PUD) Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.13.5 DIC Corporation Recent Developments/Updates

10.13.6 DIC Corporation Competitive Strengths & Weaknesses

10.14 Mitsui Chemicals, Inc.

10.14.1 Mitsui Chemicals, Inc. Details

10.14.2 Mitsui Chemicals, Inc. Major Business

10.14.3 Mitsui Chemicals, Inc. Polyurethane Dispersion (PUD) Product and Services

10.14.4 Mitsui Chemicals, Inc. Polyurethane Dispersion (PUD) Production, Price,

Value, Gross Margin and Market Share (2021-2026)

10.14.5 Mitsui Chemicals, Inc. Recent Developments/Updates

10.14.6 Mitsui Chemicals, Inc. Competitive Strengths & Weaknesses

10.15 Wanhua Chemical Group Co., Ltd.

10.15.1 Wanhua Chemical Group Co., Ltd. Details

10.15.2 Wanhua Chemical Group Co., Ltd. Major Business

10.15.3 Wanhua Chemical Group Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

10.15.4 Wanhua Chemical Group Co., Ltd. Polyurethane Dispersion (PUD)

Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.15.5 Wanhua Chemical Group Co., Ltd. Recent Developments/Updates

10.15.6 Wanhua Chemical Group Co., Ltd. Competitive Strengths & Weaknesses

10.16 Huafon Group Co., Ltd.

10.16.1 Huafon Group Co., Ltd. Details

10.16.2 Huafon Group Co., Ltd. Major Business

10.16.3 Huafon Group Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

10.16.4 Huafon Group Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.16.5 Huafon Group Co., Ltd. Recent Developments/Updates

10.16.6 Huafon Group Co., Ltd. Competitive Strengths & Weaknesses

10.17 Hefei Ketian Waterborne Technology Co., Ltd.

10.17.1 Hefei Ketian Waterborne Technology Co., Ltd. Details

10.17.2 Hefei Ketian Waterborne Technology Co., Ltd. Major Business

10.17.3 Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

10.17.4 Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.17.5 Hefei Ketian Waterborne Technology Co., Ltd. Recent Developments/Updates

10.17.6 Hefei Ketian Waterborne Technology Co., Ltd. Competitive Strengths & Weaknesses

10.18 Anhui Sinograce Chemical Co., Ltd.

10.18.1 Anhui Sinograce Chemical Co., Ltd. Details

10.18.2 Anhui Sinograce Chemical Co., Ltd. Major Business

10.18.3 Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

10.18.4 Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.18.5 Anhui Sinograce Chemical Co., Ltd. Recent Developments/Updates

10.18.6 Anhui Sinograce Chemical Co., Ltd. Competitive Strengths & Weaknesses

10.19 Guangzhou SIO New Material Co., Ltd.

10.19.1 Guangzhou SIO New Material Co., Ltd. Details

10.19.2 Guangzhou SIO New Material Co., Ltd. Major Business

10.19.3 Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

10.19.4 Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.19.5 Guangzhou SIO New Material Co., Ltd. Recent Developments/Updates

10.19.6 Guangzhou SIO New Material Co., Ltd. Competitive Strengths & Weaknesses

10.20 Dongsung Chemical Co., Ltd.

10.20.1 Dongsung Chemical Co., Ltd. Details

10.20.2 Dongsung Chemical Co., Ltd. Major Business

10.20.3 Dongsung Chemical Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

10.20.4 Dongsung Chemical Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.20.5 Dongsung Chemical Co., Ltd. Recent Developments/Updates

10.20.6 Dongsung Chemical Co., Ltd. Competitive Strengths & Weaknesses

10.21 Eternal Materials Co., Ltd.

10.21.1 Eternal Materials Co., Ltd. Details

10.21.2 Eternal Materials Co., Ltd. Major Business

10.21.3 Eternal Materials Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

- 10.21.4 Eternal Materials Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.21.5 Eternal Materials Co., Ltd. Recent Developments/Updates
- 10.21.6 Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses
- 10.22 Chansieh Enterprises Co., Ltd.
 - 10.22.1 Chansieh Enterprises Co., Ltd. Details
 - 10.22.2 Chansieh Enterprises Co., Ltd. Major Business
 - 10.22.3 Chansieh Enterprises Co., Ltd. Polyurethane Dispersion (PUD) Product and Services
 - 10.22.4 Chansieh Enterprises Co., Ltd. Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.22.5 Chansieh Enterprises Co., Ltd. Recent Developments/Updates
 - 10.22.6 Chansieh Enterprises Co., Ltd. Competitive Strengths & Weaknesses
- 10.23 Pidilite Industries Limited
 - 10.23.1 Pidilite Industries Limited Details
 - 10.23.2 Pidilite Industries Limited Major Business
 - 10.23.3 Pidilite Industries Limited Polyurethane Dispersion (PUD) Product and Services
 - 10.23.4 Pidilite Industries Limited Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.23.5 Pidilite Industries Limited Recent Developments/Updates
 - 10.23.6 Pidilite Industries Limited Competitive Strengths & Weaknesses
- 10.24 Texochem Industries
 - 10.24.1 Texochem Industries Details
 - 10.24.2 Texochem Industries Major Business
 - 10.24.3 Texochem Industries Polyurethane Dispersion (PUD) Product and Services
 - 10.24.4 Texochem Industries Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.24.5 Texochem Industries Recent Developments/Updates
 - 10.24.6 Texochem Industries Competitive Strengths & Weaknesses
- 10.25 VICHEM Joint Stock Company
 - 10.25.1 VICHEM Joint Stock Company Details
 - 10.25.2 VICHEM Joint Stock Company Major Business
 - 10.25.3 VICHEM Joint Stock Company Polyurethane Dispersion (PUD) Product and Services
 - 10.25.4 VICHEM Joint Stock Company Polyurethane Dispersion (PUD) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.25.5 VICHEM Joint Stock Company Recent Developments/Updates
 - 10.25.6 VICHEM Joint Stock Company Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

- 11.1 Polyurethane Dispersion (PUD) Industry Chain
- 11.2 Polyurethane Dispersion (PUD) Upstream Analysis
 - 11.2.1 Polyurethane Dispersion (PUD) Core Raw Materials
 - 11.2.2 Main Manufacturers of Polyurethane Dispersion (PUD) Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Polyurethane Dispersion (PUD) Production Mode
- 11.6 Polyurethane Dispersion (PUD) Procurement Model
- 11.7 Polyurethane Dispersion (PUD) Industry Sales Model and Sales Channels
 - 11.7.1 Polyurethane Dispersion (PUD) Sales Model
 - 11.7.2 Polyurethane Dispersion (PUD) Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Polyurethane Dispersion (PUD) Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Polyurethane Dispersion (PUD) Production Value by Region (2021-2026) & (USD Million)

Table 3. World Polyurethane Dispersion (PUD) Production Value by Region (2027-2032) & (USD Million)

Table 4. World Polyurethane Dispersion (PUD) Production Value Market Share by Region (2021-2026)

Table 5. World Polyurethane Dispersion (PUD) Production Value Market Share by Region (2027-2032)

Table 6. World Polyurethane Dispersion (PUD) Production by Region (2021-2026) & (K MT)

Table 7. World Polyurethane Dispersion (PUD) Production by Region (2027-2032) & (K MT)

Table 8. World Polyurethane Dispersion (PUD) Production Market Share by Region (2021-2026)

Table 9. World Polyurethane Dispersion (PUD) Production Market Share by Region (2027-2032)

Table 10. World Polyurethane Dispersion (PUD) Average Price by Region (2021-2026) & (USD/MT)

Table 11. World Polyurethane Dispersion (PUD) Average Price by Region (2027-2032) & (USD/MT)

Table 12. Polyurethane Dispersion (PUD) Major Market Trends

Table 13. World Polyurethane Dispersion (PUD) Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K MT)

Table 14. World Polyurethane Dispersion (PUD) Consumption by Region (2021-2026) & (K MT)

Table 15. World Polyurethane Dispersion (PUD) Consumption Forecast by Region (2027-2032) & (K MT)

Table 16. World Polyurethane Dispersion (PUD) Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Polyurethane Dispersion (PUD) Producers in 2025

Table 18. World Polyurethane Dispersion (PUD) Production by Manufacturer (2021-2026) & (K MT)

Table 19. Production Market Share of Key Polyurethane Dispersion (PUD) Producers in 2025

Table 20. World Polyurethane Dispersion (PUD) Average Price by Manufacturer (2021-2026) & (USD/MT)

Table 21. Global Polyurethane Dispersion (PUD) Company Evaluation Quadrant

Table 22. World Polyurethane Dispersion (PUD) Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Polyurethane Dispersion (PUD) Production Site of Key Manufacturer

Table 24. Polyurethane Dispersion (PUD) Market: Company Product Type Footprint

Table 25. Polyurethane Dispersion (PUD) Market: Company Product Application Footprint

Table 26. Polyurethane Dispersion (PUD) Competitive Factors

Table 27. Polyurethane Dispersion (PUD) New Entrant and Capacity Expansion Plans

Table 28. Polyurethane Dispersion (PUD) Mergers & Acquisitions Activity

Table 29. United States VS China Polyurethane Dispersion (PUD) Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Polyurethane Dispersion (PUD) Production Comparison, (2021 & 2025 & 2032) & (K MT)

Table 31. United States VS China Polyurethane Dispersion (PUD) Consumption Comparison, (2021 & 2025 & 2032) & (K MT)

Table 32. United States Based Polyurethane Dispersion (PUD) Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Polyurethane Dispersion (PUD) Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Polyurethane Dispersion (PUD) Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Polyurethane Dispersion (PUD) Production (2021-2026) & (K MT)

Table 36. United States Based Manufacturers Polyurethane Dispersion (PUD) Production Market Share (2021-2026)

Table 37. China Based Polyurethane Dispersion (PUD) Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Polyurethane Dispersion (PUD) Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Polyurethane Dispersion (PUD) Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Polyurethane Dispersion (PUD) Production, (2021-2026) & (K MT)

Table 41. China Based Manufacturers Polyurethane Dispersion (PUD) Production Market Share (2021-2026)

Table 42. Rest of World Based Polyurethane Dispersion (PUD) Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production, (2021-2026) & (K MT)

Table 46. Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production Market Share (2021-2026)

Table 47. World Polyurethane Dispersion (PUD) Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Polyurethane Dispersion (PUD) Production by Type (2021-2026) & (K MT)

Table 49. World Polyurethane Dispersion (PUD) Production by Type (2027-2032) & (K MT)

Table 50. World Polyurethane Dispersion (PUD) Production Value by Type (2021-2026) & (USD Million)

Table 51. World Polyurethane Dispersion (PUD) Production Value by Type (2027-2032) & (USD Million)

Table 52. World Polyurethane Dispersion (PUD) Average Price by Type (2021-2026) & (USD/MT)

Table 53. World Polyurethane Dispersion (PUD) Average Price by Type (2027-2032) & (USD/MT)

Table 54. World Polyurethane Dispersion (PUD) Production Value by Ionic Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Polyurethane Dispersion (PUD) Production by Ionic Type (2021-2026) & (K MT)

Table 56. World Polyurethane Dispersion (PUD) Production by Ionic Type (2027-2032) & (K MT)

Table 57. World Polyurethane Dispersion (PUD) Production Value by Ionic Type (2021-2026) & (USD Million)

Table 58. World Polyurethane Dispersion (PUD) Production Value by Ionic Type (2027-2032) & (USD Million)

Table 59. World Polyurethane Dispersion (PUD) Average Price by Ionic Type (2021-2026) & (USD/MT)

Table 60. World Polyurethane Dispersion (PUD) Average Price by Ionic Type

(2027-2032) & (USD/MT)

Table 61. World Polyurethane Dispersion (PUD) Production Value by Product Chemistry, (USD Million), 2021 & 2025 & 2032

Table 62. World Polyurethane Dispersion (PUD) Production by Product Chemistry (2021-2026) & (K MT)

Table 63. World Polyurethane Dispersion (PUD) Production by Product Chemistry (2027-2032) & (K MT)

Table 64. World Polyurethane Dispersion (PUD) Production Value by Product Chemistry (2021-2026) & (USD Million)

Table 65. World Polyurethane Dispersion (PUD) Production Value by Product Chemistry (2027-2032) & (USD Million)

Table 66. World Polyurethane Dispersion (PUD) Average Price by Product Chemistry (2021-2026) & (USD/MT)

Table 67. World Polyurethane Dispersion (PUD) Average Price by Product Chemistry (2027-2032) & (USD/MT)

Table 68. World Polyurethane Dispersion (PUD) Production Value by Raw Material System, (USD Million), 2021 & 2025 & 2032

Table 69. World Polyurethane Dispersion (PUD) Production by Raw Material System (2021-2026) & (K MT)

Table 70. World Polyurethane Dispersion (PUD) Production by Raw Material System (2027-2032) & (K MT)

Table 71. World Polyurethane Dispersion (PUD) Production Value by Raw Material System (2021-2026) & (USD Million)

Table 72. World Polyurethane Dispersion (PUD) Production Value by Raw Material System (2027-2032) & (USD Million)

Table 73. World Polyurethane Dispersion (PUD) Average Price by Raw Material System (2021-2026) & (USD/MT)

Table 74. World Polyurethane Dispersion (PUD) Average Price by Raw Material System (2027-2032) & (USD/MT)

Table 75. World Polyurethane Dispersion (PUD) Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Polyurethane Dispersion (PUD) Production by Application (2021-2026) & (K MT)

Table 77. World Polyurethane Dispersion (PUD) Production by Application (2027-2032) & (K MT)

Table 78. World Polyurethane Dispersion (PUD) Production Value by Application (2021-2026) & (USD Million)

Table 79. World Polyurethane Dispersion (PUD) Production Value by Application (2027-2032) & (USD Million)

Table 80. World Polyurethane Dispersion (PUD) Average Price by Application (2021-2026) & (USD/MT)

Table 81. World Polyurethane Dispersion (PUD) Average Price by Application (2027-2032) & (USD/MT)

Table 82. Covestro AG Basic Information, Manufacturing Base and Competitors

Table 83. Covestro AG Major Business

Table 84. Covestro AG Polyurethane Dispersion (PUD) Product and Services

Table 85. Covestro AG Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Covestro AG Recent Developments/Updates

Table 87. Covestro AG Competitive Strengths & Weaknesses

Table 88. BASF SE Basic Information, Manufacturing Base and Competitors

Table 89. BASF SE Major Business

Table 90. BASF SE Polyurethane Dispersion (PUD) Product and Services

Table 91. BASF SE Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. BASF SE Recent Developments/Updates

Table 93. BASF SE Competitive Strengths & Weaknesses

Table 94. Stahl Holdings B.V. Basic Information, Manufacturing Base and Competitors

Table 95. Stahl Holdings B.V. Major Business

Table 96. Stahl Holdings B.V. Polyurethane Dispersion (PUD) Product and Services

Table 97. Stahl Holdings B.V. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Stahl Holdings B.V. Recent Developments/Updates

Table 99. Stahl Holdings B.V. Competitive Strengths & Weaknesses

Table 100. Alberdingk Boley GmbH Basic Information, Manufacturing Base and Competitors

Table 101. Alberdingk Boley GmbH Major Business

Table 102. Alberdingk Boley GmbH Polyurethane Dispersion (PUD) Product and Services

Table 103. Alberdingk Boley GmbH Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Alberdingk Boley GmbH Recent Developments/Updates

Table 105. Alberdingk Boley GmbH Competitive Strengths & Weaknesses

Table 106. allnex GmbH Basic Information, Manufacturing Base and Competitors

Table 107. allnex GmbH Major Business

Table 108. allnex GmbH Polyurethane Dispersion (PUD) Product and Services

Table 109. allnex GmbH Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. allnex GmbH Recent Developments/Updates

Table 111. allnex GmbH Competitive Strengths & Weaknesses

Table 112. Lamberti S.p.A. Basic Information, Manufacturing Base and Competitors

Table 113. Lamberti S.p.A. Major Business

Table 114. Lamberti S.p.A. Polyurethane Dispersion (PUD) Product and Services

Table 115. Lamberti S.p.A. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Lamberti S.p.A. Recent Developments/Updates

Table 117. Lamberti S.p.A. Competitive Strengths & Weaknesses

Table 118. Lubrizol Corporation Basic Information, Manufacturing Base and Competitors

Table 119. Lubrizol Corporation Major Business

Table 120. Lubrizol Corporation Polyurethane Dispersion (PUD) Product and Services

Table 121. Lubrizol Corporation Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Lubrizol Corporation Recent Developments/Updates

Table 123. Lubrizol Corporation Competitive Strengths & Weaknesses

Table 124. Hawthaway Corporation Basic Information, Manufacturing Base and Competitors

Table 125. Hawthaway Corporation Major Business

Table 126. Hawthaway Corporation Polyurethane Dispersion (PUD) Product and Services

Table 127. Hawthaway Corporation Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Hawthaway Corporation Recent Developments/Updates

Table 129. Hawthaway Corporation Competitive Strengths & Weaknesses

Table 130. Michelman, Inc. Basic Information, Manufacturing Base and Competitors

Table 131. Michelman, Inc. Major Business

Table 132. Michelman, Inc. Polyurethane Dispersion (PUD) Product and Services

Table 133. Michelman, Inc. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 134. Michelman, Inc. Recent Developments/Updates

Table 135. Michelman, Inc. Competitive Strengths & Weaknesses

Table 136. Chase Corporation Basic Information, Manufacturing Base and Competitors

Table 137. Chase Corporation Major Business

Table 138. Chase Corporation Polyurethane Dispersion (PUD) Product and Services

Table 139. Chase Corporation Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 140. Chase Corporation Recent Developments/Updates

Table 141. Chase Corporation Competitive Strengths & Weaknesses

Table 142. Sika AG Basic Information, Manufacturing Base and Competitors

Table 143. Sika AG Major Business

Table 144. Sika AG Polyurethane Dispersion (PUD) Product and Services

Table 145. Sika AG Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 146. Sika AG Recent Developments/Updates

Table 147. Sika AG Competitive Strengths & Weaknesses

Table 148. UBE Corporation Basic Information, Manufacturing Base and Competitors

Table 149. UBE Corporation Major Business

Table 150. UBE Corporation Polyurethane Dispersion (PUD) Product and Services

Table 151. UBE Corporation Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 152. UBE Corporation Recent Developments/Updates

Table 153. UBE Corporation Competitive Strengths & Weaknesses

Table 154. DIC Corporation Basic Information, Manufacturing Base and Competitors

Table 155. DIC Corporation Major Business

Table 156. DIC Corporation Polyurethane Dispersion (PUD) Product and Services

Table 157. DIC Corporation Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 158. DIC Corporation Recent Developments/Updates

Table 159. DIC Corporation Competitive Strengths & Weaknesses

Table 160. Mitsui Chemicals, Inc. Basic Information, Manufacturing Base and Competitors

Table 161. Mitsui Chemicals, Inc. Major Business

Table 162. Mitsui Chemicals, Inc. Polyurethane Dispersion (PUD) Product and Services

Table 163. Mitsui Chemicals, Inc. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Mitsui Chemicals, Inc. Recent Developments/Updates

Table 165. Mitsui Chemicals, Inc. Competitive Strengths & Weaknesses

Table 166. Wanhua Chemical Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 167. Wanhua Chemical Group Co., Ltd. Major Business

Table 168. Wanhua Chemical Group Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 169. Wanhua Chemical Group Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Wanhua Chemical Group Co., Ltd. Recent Developments/Updates

Table 171. Wanhua Chemical Group Co., Ltd. Competitive Strengths & Weaknesses

Table 172. Huaфон Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 173. Huaфон Group Co., Ltd. Major Business

Table 174. Huaфон Group Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 175. Huaфон Group Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Huaфон Group Co., Ltd. Recent Developments/Updates

Table 177. Huaфон Group Co., Ltd. Competitive Strengths & Weaknesses

Table 178. Hefei Ketian Waterborne Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 179. Hefei Ketian Waterborne Technology Co., Ltd. Major Business

Table 180. Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 181. Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. Hefei Ketian Waterborne Technology Co., Ltd. Recent Developments/Updates

Table 183. Hefei Ketian Waterborne Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 184. Anhui Sinograce Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 185. Anhui Sinograce Chemical Co., Ltd. Major Business

Table 186. Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 187. Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Anhui Sinograce Chemical Co., Ltd. Recent Developments/Updates

Table 189. Anhui Sinograce Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 190. Guangzhou SIO New Material Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 191. Guangzhou SIO New Material Co., Ltd. Major Business

Table 192. Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 193. Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 194. Guangzhou SIO New Material Co., Ltd. Recent Developments/Updates

Table 195. Guangzhou SIO New Material Co., Ltd. Competitive Strengths & Weaknesses

Table 196. Dongsung Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 197. Dongsung Chemical Co., Ltd. Major Business

Table 198. Dongsung Chemical Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 199. Dongsung Chemical Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 200. Dongsung Chemical Co., Ltd. Recent Developments/Updates

Table 201. Dongsung Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 202. Eternal Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 203. Eternal Materials Co., Ltd. Major Business

Table 204. Eternal Materials Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 205. Eternal Materials Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 206. Eternal Materials Co., Ltd. Recent Developments/Updates

Table 207. Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 208. Chansieh Enterprises Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 209. Chansieh Enterprises Co., Ltd. Major Business

Table 210. Chansieh Enterprises Co., Ltd. Polyurethane Dispersion (PUD) Product and Services

Table 211. Chansieh Enterprises Co., Ltd. Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Chansieh Enterprises Co., Ltd. Recent Developments/Updates

Table 213. Chansieh Enterprises Co., Ltd. Competitive Strengths & Weaknesses

Table 214. Pidilite Industries Limited Basic Information, Manufacturing Base and Competitors

Table 215. Pidilite Industries Limited Major Business

Table 216. Pidilite Industries Limited Polyurethane Dispersion (PUD) Product and Services

Table 217. Pidilite Industries Limited Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 218. Pidilite Industries Limited Recent Developments/Updates

Table 219. Pidilite Industries Limited Competitive Strengths & Weaknesses

Table 220. Texochem Industries Basic Information, Manufacturing Base and Competitors

Table 221. Texochem Industries Major Business

Table 222. Texochem Industries Polyurethane Dispersion (PUD) Product and Services

Table 223. Texochem Industries Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 224. Texochem Industries Recent Developments/Updates

Table 225. Texochem Industries Competitive Strengths & Weaknesses

Table 226. VICHEM Joint Stock Company Basic Information, Manufacturing Base and Competitors

Table 227. VICHEM Joint Stock Company Major Business

Table 228. VICHEM Joint Stock Company Polyurethane Dispersion (PUD) Product and Services

Table 229. VICHEM Joint Stock Company Polyurethane Dispersion (PUD) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 230. VICHEM Joint Stock Company Recent Developments/Updates

Table 231. VICHEM Joint Stock Company Competitive Strengths & Weaknesses

Table 232. Global Key Players of Polyurethane Dispersion (PUD) Upstream (Raw Materials)

Table 233. Global Polyurethane Dispersion (PUD) Typical Customers

Table 234. Polyurethane Dispersion (PUD) Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Polyurethane Dispersion (PUD) Picture

Figure 2. World Polyurethane Dispersion (PUD) Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Polyurethane Dispersion (PUD) Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Polyurethane Dispersion (PUD) Production (2021-2032) & (K MT)

Figure 5. World Polyurethane Dispersion (PUD) Average Price (2021-2032) & (USD/MT)

Figure 6. World Polyurethane Dispersion (PUD) Production Value Market Share by Region (2021-2032)

Figure 7. World Polyurethane Dispersion (PUD) Production Market Share by Region (2021-2032)

Figure 8. North America Polyurethane Dispersion (PUD) Production (2021-2032) & (K MT)

Figure 9. Europe Polyurethane Dispersion (PUD) Production (2021-2032) & (K MT)

Figure 10. China Polyurethane Dispersion (PUD) Production (2021-2032) & (K MT)

Figure 11. Japan Polyurethane Dispersion (PUD) Production (2021-2032) & (K MT)

Figure 12. Polyurethane Dispersion (PUD) Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 15. World Polyurethane Dispersion (PUD) Consumption Market Share by Region (2021-2032)

Figure 16. United States Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 17. China Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 18. Europe Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 19. Japan Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 20. South Korea Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 21. ASEAN Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 22. India Polyurethane Dispersion (PUD) Consumption (2021-2032) & (K MT)

Figure 23. Producer Shipments of Polyurethane Dispersion (PUD) by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Polyurethane Dispersion (PUD) Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Polyurethane Dispersion (PUD) Markets in 2025

Figure 26. United States VS China: Polyurethane Dispersion (PUD) Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Polyurethane Dispersion (PUD) Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Polyurethane Dispersion (PUD) Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Polyurethane Dispersion (PUD) Production Market Share 2025

Figure 30. China Based Manufacturers Polyurethane Dispersion (PUD) Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Polyurethane Dispersion (PUD) Production Market Share 2025

Figure 32. World Polyurethane Dispersion (PUD) Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Polyurethane Dispersion (PUD) Production Value Market Share by Type in 2025

Figure 34. Waterborne Dispersion

Figure 35. Solvent Assisted Dispersion

Figure 36. Specialty Low Solvent Dispersion

Figure 37. World Polyurethane Dispersion (PUD) Production Market Share by Type (2021-2032)

Figure 38. World Polyurethane Dispersion (PUD) Production Value Market Share by Type (2021-2032)

Figure 39. World Polyurethane Dispersion (PUD) Average Price by Type (2021-2032) & (USD/MT)

Figure 40. World Polyurethane Dispersion (PUD) Production Value by Ionic Type, (USD Million), 2021 & 2025 & 2032

Figure 41. World Polyurethane Dispersion (PUD) Production Value Market Share by Ionic Type in 2025

Figure 42. Anionic PUDs

Figure 43. Cationic PUDs

Figure 44. Nonionic PUDs

Figure 45. Others

Figure 46. World Polyurethane Dispersion (PUD) Production Market Share by Ionic Type (2021-2032)

Figure 47. World Polyurethane Dispersion (PUD) Production Value Market Share by Ionic Type (2021-2032)

Figure 48. World Polyurethane Dispersion (PUD) Average Price by Ionic Type (2021-2032) & (USD/MT)

Figure 49. World Polyurethane Dispersion (PUD) Production Value by Product Chemistry, (USD Million), 2021 & 2025 & 2032

Figure 50. World Polyurethane Dispersion (PUD) Production Value Market Share by Product Chemistry in 2025

Figure 51. Polyester Based PUDs

Figure 52. Polyether Based PUDs

Figure 53. Polycarbonate Based PUDs

Figure 54. Others

Figure 55. World Polyurethane Dispersion (PUD) Production Market Share by Product Chemistry (2021-2032)

Figure 56. World Polyurethane Dispersion (PUD) Production Value Market Share by Product Chemistry (2021-2032)

Figure 57. World Polyurethane Dispersion (PUD) Average Price by Product Chemistry (2021-2032) & (USD/MT)

Figure 58. World Polyurethane Dispersion (PUD) Production Value by Raw Material System, (USD Million), 2021 & 2025 & 2032

Figure 59. World Polyurethane Dispersion (PUD) Production Value Market Share by Raw Material System in 2025

Figure 60. Aromatic Isocyanate Based PUDs

Figure 61. Aliphatic Isocyanate Based PUDs

Figure 62. Bio Based PUDs

Figure 63. World Polyurethane Dispersion (PUD) Production Market Share by Raw Material System (2021-2032)

Figure 64. World Polyurethane Dispersion (PUD) Production Value Market Share by Raw Material System (2021-2032)

Figure 65. World Polyurethane Dispersion (PUD) Average Price by Raw Material System (2021-2032) & (USD/MT)

Figure 66. World Polyurethane Dispersion (PUD) Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 67. World Polyurethane Dispersion (PUD) Production Value Market Share by Application in 2025

Figure 68. Industrial Manufacturing

Figure 69. Building and Furniture

Figure 70. Automotive and Transportation

Figure 71. Footwear and Consumer Goods

Figure 72. World Polyurethane Dispersion (PUD) Production Market Share by Application (2021-2032)

Figure 73. World Polyurethane Dispersion (PUD) Production Value Market Share by Application (2021-2032)

Figure 74. World Polyurethane Dispersion (PUD) Average Price by Application (2021-2032) & (USD/MT)

Figure 75. Polyurethane Dispersion (PUD) Industry Chain

Figure 76. Polyurethane Dispersion (PUD) Procurement Model

Figure 77. Polyurethane Dispersion (PUD) Sales Model

Figure 78. Polyurethane Dispersion (PUD) Sales Channels, Direct Sales, and Distribution

Figure 79. Methodology

Figure 80. Research Process and Data Source

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