

Global Polyurethane Dispersions for Adhesives Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Polyurethane Dispersions for Adhesives market size was valued at US\$ 659 million in 2025 and is forecast to a readjusted size of US\$ 1056 million by 2032 with a CAGR of 6.8% during review period.

Polyurethane dispersions for adhesives are waterborne resin materials in which polyurethane polymer particles are dispersed in water and function as the main bonding polymer in adhesive formulations. They are mainly used to produce environmentally oriented waterborne polyurethane adhesives or as core film-forming binder resins in adhesive systems. The product is typically supplied as a milky white or semi-transparent liquid and can be designed based on polyester, polyether, polycarbonate, or modified polyurethane systems, providing good initial tack, peel strength, flexibility, heat resistance, hydrolysis resistance, humidity resistance, and low volatile emissions.

Major production and consumption regions include China, Germany, the United States, Japan, South Korea, Taiwan, Italy, and India. Typical applications include footwear adhesives, furniture and woodworking adhesives, automotive interior lamination adhesives, packaging lamination adhesives, textile bonding adhesives, leather lamination adhesives, film lamination adhesives, and consumer goods assembly adhesives. The recommended report scope includes waterborne polyurethane dispersions and waterborne PU adhesive resins used in adhesive formulations, while excluding solvent-based polyurethane adhesives, polyurethane hot-melt adhesives, polyurethane sealants, polyurethane dispersions for coatings, and non-adhesive applications.

In 2025, global production of polyurethane dispersions for adhesives reached approximately 190,000 to 225,000 tons, with mainstream FOB prices ranging from USD 2.65 to USD 3.45 per kg. Products used in footwear, furniture, and general lamination adhesives were generally priced toward the lower end, while automotive interior, high-heat-resistance, high-hydrolysis-resistance, high-peel-strength, two-component crosslinking, and heat-activated grades were positioned near the upper end. From 2026 to 2032, substitution of low-VOC adhesive systems, waterborne conversion in footwear and furniture manufacturing, lightweight automotive interior lamination, and upgrades in packaging and textile composite materials are expected to support steady demand growth for polyurethane dispersions for adhesives.

The global market for polyurethane dispersions for adhesives is benefiting from low-VOC material substitution, greener downstream manufacturing, and the expansion of composite-material applications. In earlier stages, waterborne PUD adhesives were mainly used to replace selected solvent-based polyurethane adhesives, reducing organic solvent emissions, improving workplace conditions, and helping footwear, furniture, automotive, and packaging customers meet environmental compliance requirements. Today, market attention has moved beyond environmental attributes toward integrated bonding performance, including initial tack, peel strength, heat resistance, humidity resistance, hydrolysis resistance, flexibility, aging resistance, and compatibility across different substrates. Footwear, leather goods, furniture, woodworking, and general lamination remain the core application base, while automotive interiors, lightweight composite materials, functional textiles, flexible packaging, and premium consumer goods assembly are becoming higher-value growth areas.

The main challenges come from cost pressure, differences in application processes, and technical barriers in high-performance use cases. Compared with mature solvent-based systems, waterborne polyurethane dispersions still require precise formulation support in drying speed, open time, heat-activation window, low-temperature bonding, water whitening resistance, and durability under extreme conditions. Price volatility in isocyanates, polyols, chain extenders, crosslinkers, and functional additives can also affect producer profitability. Low-to-mid-end footwear, furniture, and packaging adhesive markets remain highly price-competitive, and some customers still prefer lower-cost EVA emulsions, acrylic emulsions, or solvent-based adhesives. Over the long term, however, stricter global low-VOC regulation, environmental audits across brand supply chains, lightweighting trends in automotive and consumer products, and waterborne conversion in Asian manufacturing will continue to raise the penetration rate of polyurethane dispersions for adhesives and drive product development toward higher

solid content, faster drying, stronger bonding, lower odor, and greater customization.

This report is a detailed and comprehensive analysis for global Polyurethane Dispersions for Adhesives 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 Polyurethane Dispersions for Adhesives market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Polyurethane Dispersions for Adhesives market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Polyurethane Dispersions for Adhesives market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Polyurethane Dispersions for Adhesives market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 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 Polyurethane Dispersions for Adhesives

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 Polyurethane Dispersions for Adhesives 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 Covestro AG, BASF SE, Henkel AG and Co. KGaA, UBE Corporation, DIC Corporation, Mitsui Chemicals, Inc., Dainichiseika Color and Chemicals Mfg. Co., Ltd., Sanyo Chemical Industries, Ltd., Lubrizol Corporation, Hauthaway Corporation, etc.

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

Market Segmentation

Polyurethane Dispersions for Adhesives 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

- One Component System

- Two Component Crosslinking System

- Self Crosslinking System

Market segment by Chemistry

- Polyester Polyurethane Dispersion

- Polyether Polyurethane Dispersion

- Polycarbonate Polyurethane Dispersion

- Modified Polyurethane Dispersion

Market segment by Solid Content

Medium Solid Content

High Solid Content

Low Solid Content

Market segment by Ionic Character

Anionic Polyurethane Dispersion

Nonionic Polyurethane Dispersion

Cationic Polyurethane Dispersion

Market segment by Application

Footwear and Leather Goods

Furniture and Building Materials

Automotive and Transportation

Packaging and Consumer Goods

Others

Major players covered

Covestro AG

BASF SE

Henkel AG and Co. KGaA

UBE Corporation

DIC Corporation

Mitsui Chemicals, Inc.

Dainichiseika Color and Chemicals Mfg. Co., Ltd.

Sanyo Chemical Industries, Ltd.

Lubrizol Corporation

Hauthaway Corporation

Chase Corporation

H.B. Fuller Company

Jowat SE

Alberdingk Boley GmbH

Lamberti S.p.A.

SIWO US Inc.

Wanhua Chemical Group Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Anhui Anda Huatai New Materials Co., Ltd.

Nan Pao Resins Chemical Co., Ltd.

Great Eastern Resins Industrial Co., Ltd.

Taiwan PU Corporation

Susan Materials Co., Ltd.

Kangnam Chemical Co., Ltd.

Hemanjali Polymers Pvt. Ltd.

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)

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

Chapter 1, to describe Polyurethane Dispersions for Adhesives product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Polyurethane Dispersions for Adhesives, with price, sales quantity, revenue, and global market share of Polyurethane Dispersions for Adhesives from 2021 to 2026.

Chapter 3, the Polyurethane Dispersions for Adhesives competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Polyurethane Dispersions for Adhesives 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 Polyurethane Dispersions for Adhesives 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 Polyurethane Dispersions for Adhesives.

Chapter 14 and 15, to describe Polyurethane Dispersions for Adhesives sales channel, distributors, customers, research findings and conclusion.

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