

Global Polyurethane Dispersions for Adhesives Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polyurethane Dispersions for Adhesives market size is expected to reach \$ 1056 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

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 studies the global Polyurethane Dispersions for Adhesives production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Polyurethane Dispersions for Adhesives total production and demand, 2021-2032, (Kilotons)

Global Polyurethane Dispersions for Adhesives total production value, 2021-2032, (USD Million)

Global Polyurethane Dispersions for Adhesives production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Polyurethane Dispersions for Adhesives consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Polyurethane Dispersions for Adhesives domestic production, consumption, key domestic manufacturers and share

Global Polyurethane Dispersions for Adhesives production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Polyurethane Dispersions for Adhesives production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Polyurethane Dispersions for Adhesives production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Polyurethane Dispersions for Adhesives 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, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Polyurethane Dispersions for Adhesives market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Dispersions for Adhesives Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Dispersions for Adhesives Market, Segmentation by Type:

One Component System

Two Component Crosslinking System

Self Crosslinking System

Global Polyurethane Dispersions for Adhesives Market, Segmentation by Chemistry:

- Polyester Polyurethane Dispersion
- Polyether Polyurethane Dispersion
- Polycarbonate Polyurethane Dispersion
- Modified Polyurethane Dispersion

Global Polyurethane Dispersions for Adhesives Market, Segmentation by Solid Content:

- Medium Solid Content
- High Solid Content
- Low Solid Content

Global Polyurethane Dispersions for Adhesives Market, Segmentation by Ionic Character:

- Anionic Polyurethane Dispersion
- Nonionic Polyurethane Dispersion
- Cationic Polyurethane Dispersion

Global Polyurethane Dispersions for Adhesives Market, Segmentation by Application:

- Footwear and Leather Goods
- Furniture and Building Materials
- Automotive and Transportation
- Packaging and Consumer Goods

Others

Companies Profiled:

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.

Key Questions Answered:

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

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