

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

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Abstracts

The global Polyurethane Dispersions for Coatings market size is expected to reach \$ 1989 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

Polyurethane dispersions for coatings are waterborne resin materials in which polyurethane polymer particles are dispersed in water and function as film-forming binders, modifying resins, or functional binders in waterborne coating formulations. The product is typically supplied as a milky white or semi-transparent liquid and can be designed using polyester, polyether, polycarbonate, or acrylic-modified polyurethane systems. It provides flexibility, abrasion resistance, adhesion, chemical resistance, weatherability, scratch resistance, elasticity, and low volatile emissions, making it an important component of waterborne industrial coatings and environmentally oriented surface treatment materials.

Major production and consumption regions include China, Germany, the Netherlands, the United States, Japan, South Korea, Italy, and India. Typical applications include wood coatings, furniture coatings, floor coatings, architectural coatings, industrial protective coatings, automotive interior and exterior coatings, metal coatings, plastic coatings, textile coatings, leather coatings, and overprint varnish systems. The recommended report scope includes waterborne polyurethane dispersions used in coatings and surface coatings, while excluding adhesives, sealants, foams, elastomers, standalone synthetic leather resins, and solvent-based polyurethane resins.

In 2025, global production of polyurethane dispersions for coatings reached approximately 360,000 to 420,000 tons, with mainstream FOB prices ranging from USD 2.55 to USD 3.35 per kg. Products used in architectural coatings and general wood

coatings were generally priced toward the lower end, while automotive interior, industrial protective, high-abrasion-resistance, high-chemical-resistance, high-weatherability, and two-component crosslinking grades were positioned near the upper end. From 2026 to 2032, tightening low-VOC coating regulations, higher penetration of waterborne industrial coatings, environmental substitution in wood and furniture coatings, and material upgrades in automotive and consumer electronics surfaces are expected to support steady demand growth for polyurethane dispersions for coatings.

The global market for polyurethane dispersions for coatings is being shaped by both waterborne substitution and performance upgrading. In earlier stages, growth was mainly driven by the replacement of solvent-based coating resins under environmental regulation, especially in wood, furniture, architectural, textile, and light industrial coatings, where low VOC, low odor, and safer application conditions were the core value propositions. Today, market demand is moving beyond environmental compliance toward performance enhancement. Customers are placing greater emphasis on abrasion resistance, scratch resistance, chemical resistance, weatherability, elasticity, adhesion, transparency, matte effects, and formulation stability. Automotive interiors, consumer electronics, industrial protection, metal and plastic surface treatment, functional textiles, and premium wood coatings are becoming higher-value growth areas.

The main challenges come from cost pressure, formulation complexity, and differences in downstream application conditions. Compared with mature solvent-based systems, waterborne polyurethane dispersions still require strong technical support in drying speed, low-temperature film formation, thick-film application, water whitening resistance, chemical resistance balance, and compatibility with other resin systems. Price volatility in isocyanates, polyols, chain extenders, co-solvents, and functional additives can also affect producer profitability. Low-to-mid-end architectural and general industrial coatings remain highly price-competitive, and some customers still prefer lower-cost acrylic emulsions or solvent-based systems. Over the long term, however, global low-VOC regulation, green supply-chain requirements, waterborne industrial coating conversion, environmental substitution in wood coatings, and rising demand for high-end functional surfaces will continue to expand the application boundary of polyurethane dispersions for coatings and drive the industry toward lower-carbon, higher-solid-content, hybrid-modified, and more customized solutions.

This report studies the global Polyurethane Dispersions for Coatings production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Polyurethane Dispersions for Coatings 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, Stahl Holdings B.V., BASF SE, Lubrizol Corporation, allnex, Alberdingk Boley GmbH, Lamberti S.p.A., RUDOLF GmbH, UBE Corporation, Mitsui Chemicals, Inc., 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 Coatings 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 Coatings Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Dispersions for Coatings Market, Segmentation by Type:

One Component System

Two Component Crosslinking System

Self Crosslinking System

Global Polyurethane Dispersions for Coatings Market, Segmentation by Chemistry:

Polyester Polyurethane Dispersion

Polyether Polyurethane Dispersion

Polycarbonate Polyurethane Dispersion

Acrylic Modified Polyurethane Dispersion

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

Medium Solid Content

High Solid Content

Low Solid Content

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

Anionic Polyurethane Dispersion

Nonionic Polyurethane Dispersion

Cationic Polyurethane Dispersion

Global Polyurethane Dispersions for Coatings Market, Segmentation by Application:

Furniture and Flooring

Construction and Building Materials

Automotive and Transportation

Packaging and Consumer Goods

Others

Companies Profiled:

Covestro AG

Stahl Holdings B.V.

BASF SE

Lubrizol Corporation

allnex

Alberdingk Boley GmbH

Lamberti S.p.A.

RUDOLF GmbH

UBE Corporation

Mitsui Chemicals, Inc.

DIC Corporation

Dainichiseika Color and Chemicals Mfg. Co., Ltd.

DKS Co. Ltd.

Hauthaway Corporation

Chase Corporation

Essential Industries, Inc.

SNP Inc.

Wanhua Chemical Group Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Huafon Group Co., Ltd.

Sichuan Dowell Science and Technology Inc.

Eternal Materials Co., Ltd.

Susan Materials Co., Ltd.

Hemanjali Polymers Pvt. Ltd.

ROIDEC Private Limited

Key Questions Answered:

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

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