

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

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Abstracts

The global Polyurethane Dispersions for Footwear Materials market size is expected to reach \$ 704 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

Polyurethane dispersions for footwear materials are waterborne resin materials in which polyurethane polymer particles are dispersed in water and function as key bonding or film-forming components in footwear material manufacturing and lamination. They are mainly used in sports shoes, casual shoes, leather shoes, outdoor footwear, and functional footwear. The product is typically supplied as a milky white or semi-transparent liquid and can be used as a resin for footwear adhesives, synthetic upper leather, textile upper coatings, upper finishing, and composite-material bonding, providing flexibility, initial tack, peel strength, flex resistance, hydrolysis resistance, abrasion resistance, heat resistance, and low odor.

Major production and consumption regions include China, Vietnam, India, Indonesia, Germany, the United States, Japan, South Korea, and Taiwan. Key applications include upper materials, sole bonding, footwear material lamination, synthetic leather uppers, textile upper coatings, sports shoe component bonding, and environmentally oriented footwear adhesives. The recommended report scope includes waterborne polyurethane dispersions used in footwear adhesives, synthetic uppers, footwear coatings, and lamination processes, while excluding polyurethane hot-melt adhesives, solvent-based PU adhesives, TPU pellets, EVA foam materials, finished footwear, and non-footwear applications.

In 2025, global production of polyurethane dispersions for footwear materials reached

approximately 130,000 to 155,000 tons, with mainstream FOB prices ranging from USD 2.65 to USD 3.45 per kg. General footwear lamination adhesives and standard upper coating grades were generally priced toward the lower end, while high-hydrolysis-resistance, high-peel-strength, heat-activated, high-elasticity sports shoe bonding, low-odor, and high-flex-resistance formulations were positioned near the upper end. From 2026 to 2032, waterborne substitution in footwear manufacturing, upgrading demand for sports and athleisure shoes, stricter green supply-chain requirements from brands, and technical transformation of the Asian footwear materials supply chain are expected to support steady demand growth for polyurethane dispersions for footwear materials.

The global market for polyurethane dispersions for footwear materials is shifting from environmental substitution toward higher-performance footwear material solutions. In earlier stages, the core value of waterborne PUD in footwear was mainly to replace selected solvent-based PU adhesives and high-solvent upper treatment systems, reducing organic solvent emissions, improving factory working conditions, and meeting brand requirements for restricted substances and odor control. As sports, athleisure, outdoor, and functional footwear markets continue to expand, end-user requirements have moved beyond bonding strength alone to flex resistance, hydrolysis resistance, humidity resistance, soft touch, lightweighting, abrasion resistance, low odor, and compatibility with multiple substrates. Synthetic upper leather, textile upper coatings, sole bonding, insole lamination, and sports shoe component assembly are expected to keep expanding the application boundary of waterborne polyurethane dispersions.

The main challenges come from cost sensitivity, process conversion, and performance balancing in premium applications. The footwear supply chain is highly focused on cost, lead time, and batch stability, while some low-to-mid-end manufacturers still rely on solvent-based adhesives, EVA emulsions, or other lower-cost systems. Waterborne PUD requires strong formulation and process support in drying speed, open time, heat-activation window, low-temperature bonding, sweat resistance, and hydrolysis resistance. Price volatility in isocyanates, polyols, chain extenders, crosslinkers, and functional additives can also affect producer margins. Over the long term, however, global footwear brands are increasing requirements for low-carbon materials, green factories, and supply-chain compliance, while waterborne conversion in major footwear manufacturing bases such as China, Vietnam, India, and Indonesia is expected to continue. This will drive polyurethane dispersions for footwear materials toward faster drying, higher solid content, stronger bonding, lower odor, and greater customization.

This report studies the global Polyurethane Dispersions for Footwear Materials

production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Polyurethane Dispersions for Footwear Materials 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, Wanhua Chemical Group Co., Ltd., BASF SE, Lubrizol Corporation, H.B. Fuller Company, Hauthaway Corporation, Chase Corporation, SIWO US Inc., UBE Corporation, DIC 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 Footwear Materials 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 Footwear Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Dispersions for Footwear Materials Market, Segmentation by Type:

One Component System

Two Component Crosslinking System

Self Crosslinking System

Global Polyurethane Dispersions for Footwear Materials Market, Segmentation by Chemistry:

Polyester Polyurethane Dispersion

Polyether Polyurethane Dispersion

Polycarbonate Polyurethane Dispersion

Modified Polyurethane Dispersion

Global Polyurethane Dispersions for Footwear Materials Market, Segmentation by Solid Content:

Medium Solid Content

High Solid Content

Low Solid Content

Global Polyurethane Dispersions for Footwear Materials Market, Segmentation by Ionic Character:

Anionic Polyurethane Dispersion

Nonionic Polyurethane Dispersion

Cationic Polyurethane Dispersion

Global Polyurethane Dispersions for Footwear Materials Market, Segmentation by Application:

Footwear Adhesives

Synthetic Upper Materials

Textile Upper Coatings

Others

Companies Profiled:

Covestro AG

Wanhua Chemical Group Co., Ltd.

BASF SE

Lubrizol Corporation

H.B. Fuller Company

Hauthaway Corporation

Chase Corporation

SIWO US Inc.

UBE Corporation

DIC Corporation

Mitsui Chemicals, Inc.

Dainichiseika Color and Chemicals Mfg. Co., Ltd.

Sanyo Chemical Industries, Ltd.

Alberdingk Boley GmbH

Lamberti S.p.A.

PURIN Polyurethane

Dongsung Chemical Co., Ltd.

Susan Materials Co., Ltd.

Nan Pao Resins Chemical Co., Ltd.

Great Eastern Resins Industrial Co., Ltd.

Taiwan PU Corporation

Shanghai Huide Science and Technology Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Anhui Anda Huatai New Materials Co., Ltd.

Hemanjali Polymers Pvt. Ltd.

Key Questions Answered:

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

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