

# Global Polyurethane Dispersions for PU Leather Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Polyurethane Dispersions for PU Leather market size is expected to reach \$ 1209 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

Polyurethane dispersions for PU leather are waterborne polyurethane resin materials used in the manufacture of PU synthetic leather, artificial leather, and related coated textiles. They are typically formulated as milky white or semi-transparent liquids, with polyurethane polymer particles dispersed in water as the continuous phase. These products are applied in topcoats, foam layers, base coats, impregnation layers, adhesive layers, and surface finishing layers, providing soft touch, elasticity, abrasion resistance, hydrolysis resistance, flex resistance, scratch resistance, and low odor. They are important alternatives to traditional solvent-based PU resins as the synthetic leather industry shifts toward lower-VOC, lower-solvent, and more environmentally compliant manufacturing processes.

Major production and consumption regions include China, Japan, South Korea, Taiwan, Germany, Italy, the United States, and India. Key downstream applications include footwear upper leather, bags and luggage leather, apparel leather, sofa and furniture upholstery, automotive interior leather, sporting goods leather, and high-end coated textiles. The recommended report scope includes waterborne polyurethane dispersions and waterborne PU resins for synthetic leather, while excluding finished PU leather, natural leather, PVC artificial leather base resins, solvent-based PU resins, and solvent-free two-component PU leather systems.

In 2025, global production of polyurethane dispersions for PU leather reached approximately 255,000 to 300,000 tons, with mainstream FOB prices ranging from USD

2.40 to USD 3.15 per kg. Products used in footwear, luggage, and general apparel leather were generally priced toward the lower end, while automotive interior, high-hydrolysis-resistance, high-abrasion-resistance, mechanically foamed, low-odor, and low-VOC formulations were positioned near the upper end. From 2026 to 2032, tightening environmental regulations, green supply-chain upgrades by brand owners, lightweight automotive interiors, and performance upgrades in footwear, apparel, and luggage materials are expected to support steady demand growth for polyurethane dispersions for PU leather.

The global market for polyurethane dispersions for PU leather is moving from environmental substitution toward performance-driven upgrading. In the past, growth was mainly driven by the replacement of solvent-based PU resins and high-solvent processes to reduce volatile organic compound emissions, improve the production environment, and meet brand owners' restricted-substance requirements. Today, end users no longer view the product merely as a substitute; demand has extended to soft touch, hydrolysis resistance, abrasion resistance, low odor, low fogging, yellowing resistance, mechanical foaming capability, and bio-based content. Footwear, luggage, furniture, and apparel remain the core demand base, while automotive interiors, sporting goods, premium home furnishings, and functional coated textiles are becoming higher-growth applications.

The main challenges lie in cost control, process compatibility, and performance balancing. Compared with mature solvent-based systems, waterborne polyurethane dispersions still face technical barriers in drying efficiency, thick-film formation, foaming stability, production-line adaptation, and extreme durability. Price volatility in isocyanates, polyols, chain extenders, and functional additives can also affect producer margins. Low-to-mid-end PU leather markets remain highly price-sensitive, and some regions still prefer lower-cost traditional systems. Over the long term, however, global environmental regulation, ESG requirements from consumer brands, automotive interior material upgrades, and technical transformation of the Asian synthetic leather supply chain will continue to increase the penetration of waterborne systems and drive the industry toward lower-carbon, higher-performance, and more customized solutions.

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

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

Highlights and key features of the study

Global Polyurethane Dispersions for PU Leather total production and demand, 2021-2032, (Tons)

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

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

Global Polyurethane Dispersions for PU Leather consumption by region & country, CAGR, 2021-2032 & (Tons)

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

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

Global Polyurethane Dispersions for PU Leather production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Polyurethane Dispersions for PU Leather production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Polyurethane Dispersions for PU Leather 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, UBE Corporation, DIC Corporation, Dainichiseika Color and Chemicals Mfg. Co., Ltd., Sanyo Chemical Industries, Ltd., DKS Co. Ltd., Alberdingk Boley GmbH, 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 PU Leather market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) 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 PU Leather Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Polyurethane Dispersions for PU Leather Market, Segmentation by Type:

Polyester Polyurethane Dispersion

Polyether Polyurethane Dispersion

Polycarbonate Polyurethane Dispersion

Others

#### Global Polyurethane Dispersions for PU Leather Market, Segmentation by Functionality:

One Component System

Two Component Crosslinking System

Self Crosslinking System

Global Polyurethane Dispersions for PU Leather Market, Segmentation by Solid Content:

Medium Solid Content

High Solid Content

Low Solid Content

Global Polyurethane Dispersions for PU Leather Market, Segmentation by Ionic Character:

Anionic Polyurethane Dispersion

Nonionic Polyurethane Dispersion

Cationic Polyurethane Dispersion

Global Polyurethane Dispersions for PU Leather Market, Segmentation by Application:

Footwear Leather

Bags and Luggage Leather

Furniture and Upholstery Leather

Automotive and Apparel Leather

Companies Profiled:

Covestro AG

Stahl Holdings B.V.

BASF SE

Lubrizol Corporation

UBE Corporation

DIC Corporation

Dainichiseika Color and Chemicals Mfg. Co., Ltd.

Sanyo Chemical Industries, Ltd.

DKS Co. Ltd.

Alberdingk Boley GmbH

Lamberti S.p.A.

allnex

SIWO US Inc.

Wanhua Chemical Group Co., Ltd.

Huafon Group Co., Ltd.

Shanghai Huide Science and Technology Co., Ltd.

Sichuan Dowell Science and Technology Inc.

Great Eastern Resins Industrial Co., Ltd.

Nan Pao Resins Chemical Co., Ltd.

Eternal Materials Co., Ltd.

Union Chemical Co., Ltd.

Hemanjali Polymers Pvt. Ltd.

ROIDEC Private Limited

Key Questions Answered:

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

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