

Global Polyurethane Dispersions (PUDs) 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 (PUDs) market size was valued at US\$ 2830 million in 2025 and is forecast to a readjusted size of US\$ 4391 million by 2032 with a CAGR of 6.3% during review period.

Polyurethane Dispersions are stable dispersion systems in which polyurethane polymer particles are dispersed in water or a low-solvent continuous phase. They are typically supplied as milky white to translucent liquids and combine the flexibility, abrasion resistance, adhesion, film-forming capability, and chemical resistance of polyurethane materials with substantially lower volatile organic compound emissions than conventional solvent-borne polyurethane systems. PUDs can be classified into anionic, cationic, nonionic, self-crosslinking, and other functional grades, and are mainly used in coatings, adhesives, sealants, synthetic leather, textile finishing, footwear materials, automotive interiors, wood coatings, and packaging materials. Major production and consumption regions include China, Europe, the United States, Japan, South Korea, and Southeast Asia, with China showing strong scale competitiveness in mid-range and application-formulated products, while European, U.S., and Japanese suppliers remain strong in high-performance waterborne resins, functional dispersions, and environmentally compliant specialty grades.

In 2025, global Polyurethane Dispersions production reached approximately 720,000 to 780,000 metric tons, while mainstream industrial-grade products were priced at about USD 4,200 to USD 4,700 per metric ton on an ex-works or FOB-equivalent basis. Driven by rising demand from waterborne coatings, environmentally compliant adhesives, synthetic leather, textile finishing, automotive interiors, and packaging

coatings, the PUDs market continued to shift toward low-VOC, low-solvent, high-solids, self-crosslinking, and functionalized formulations, with Asia Pacific remaining the largest production and consumption region, while Europe and North America were mainly supported by environmental regulations, high-performance coatings, and industrial material upgrades.

The global Polyurethane Dispersions market is moving from an environmental substitution cycle to a performance-upgrade cycle. Historically, the core value proposition of PUDs was the reduction of solvent use and volatile organic compound emissions. The market focus is now shifting toward high solids, co-solvent-free systems, self-crosslinking chemistry, hydrolysis resistance, non-yellowing performance, soft-touch properties, and adhesion to multiple substrates. Coatings and adhesives remain the main demand base, while automotive interiors, wood furniture, sports footwear, synthetic leather, textile coatings, and flexible packaging are driving the transition from general-purpose resins to application-specific resin systems. In branded consumer goods, automotive, construction, and industrial coating applications, end users are demanding lower odor, lower emissions, better durability, and stronger process compatibility, making PUDs not only a substitute for solvent-borne polyurethane but also a key platform material in waterborne polymer systems.

The market still faces three major challenges. First, fluctuations in isocyanates, polyether polyols, polyester polyols, chain extenders, and functional monomers directly affect production costs and margin stability. Second, downstream requirements vary widely in terms of particle size, solids content, viscosity, minimum film-forming temperature, soft and hard segment structure, and ionic stability, making high-end market entry dependent on long-term formulation know-how and customer validation. Third, although PUDs have clear environmental advantages, they still compete with solvent-borne systems, acrylic emulsions, waterborne epoxies, and modified silicone materials in applications requiring very high chemical resistance, water resistance, or extreme operating durability. Future opportunities will concentrate on lightweight automotive interiors, solvent-free synthetic leather, low-odor home materials, bio-based polyurethane dispersions, recyclable packaging coatings, and smart textile coatings; suppliers with strong resin design, application development, and global customer qualification capabilities are more likely to capture premium market positions.

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

Global Polyurethane Dispersions (PUDs) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2021-2032

Global Polyurethane Dispersions (PUDs) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2021-2032

Global Polyurethane Dispersions (PUDs) market shares of main players, shipments in revenue (\$ Million), sales quantity (K MT), and ASP (USD/MT), 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 (PUDs)

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 (PUDs) 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, Stahl Holdings B.V., Alberdingk Boley GmbH, allnex GmbH, Lamberti S.p.A., Lubrizol Corporation, Hauthaway Corporation, Michelman, Inc., Chase Corporation, etc.

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

Market Segmentation

Polyurethane Dispersions (PUDs) 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

- Waterborne Dispersion

- Solvent Assisted Dispersion

- Specialty Low Solvent Dispersion

Market segment by Ionic Type

- Anionic PUDs

- Cationic PUDs

- Nonionic PUDs

- Others

Market segment by Product Chemistry

- Polyester Based PUDs

- Polyether Based PUDs

- Polycarbonate Based PUDs

Others

Market segment by Raw Material System

Aromatic Isocyanate Based PUDs

Aliphatic Isocyanate Based PUDs

Bio Based PUDs

Market segment by Application

Coatings

Adhesives and Sealants

Synthetic Leather and Textile Finishing

Others

Major players covered

Covestro AG

BASF SE

Stahl Holdings B.V.

Alberdingk Boley GmbH

allnex GmbH

Lamberti S.p.A.

Lubrizol Corporation

Hauthaway Corporation

Michelman, Inc.

Chase Corporation

Sika AG

UBE Corporation

DIC Corporation

Mitsui Chemicals, Inc.

Wanhua Chemical Group Co., Ltd.

Huafon Group Co., Ltd.

Hefei Ketian Waterborne Technology Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Guangzhou SIO New Material Co., Ltd.

Dongsung Chemical Co., Ltd.

Eternal Materials Co., Ltd.

Chansieh Enterprises Co., Ltd.

Pidilite Industries Limited

Texochem Industries

VICHEM Joint Stock Company

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 (PUDs) product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Polyurethane Dispersions (PUDs) 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 (PUDs) 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 (PUDs).

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