

Global Polyurethane Dispersions (PUDs) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Polyurethane Dispersions (PUDs) market size is expected to reach \$ 4391 million by 2032, rising at a market growth of 6.3% CAGR during the forecast period (2026-2032).

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 studies the global Polyurethane Dispersions (PUDs) production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Polyurethane Dispersions (PUDs) total production and demand, 2021-2032, (K MT)

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

Global Polyurethane Dispersions (PUDs) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Polyurethane Dispersions (PUDs) consumption by region & country, CAGR, 2021-2032 & (K MT)

U.S. VS China: Polyurethane Dispersions (PUDs) domestic production, consumption, key domestic manufacturers and share

Global Polyurethane Dispersions (PUDs) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Polyurethane Dispersions (PUDs) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Polyurethane Dispersions (PUDs) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Polyurethane Dispersions (PUDs) 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, Stahl Holdings B.V., Alberdingk Boley GmbH, allnex GmbH, Lamberti S.p.A., Lubrizol Corporation, Hawthaway Corporation, Michelman, Inc., Chase 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 (PUDs) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 (PUDs) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polyurethane Dispersions (PUDs) Market, Segmentation by Type:

Waterborne Dispersion

Solvent Assisted Dispersion

Specialty Low Solvent Dispersion

Global Polyurethane Dispersions (PUDs) Market, Segmentation by Ionic Type:

Anionic PUDs

Cationic PUDs

Nonionic PUDs

Others

Global Polyurethane Dispersions (PUDs) Market, Segmentation by Product Chemistry:

Polyester Based PUDs

Polyether Based PUDs

Polycarbonate Based PUDs

Others

Global Polyurethane Dispersions (PUDs) Market, Segmentation by Raw Material System:

Aromatic Isocyanate Based PUDs

Aliphatic Isocyanate Based PUDs

Bio Based PUDs

Global Polyurethane Dispersions (PUDs) Market, Segmentation by Application:

Coatings

Adhesives and Sealants

Synthetic Leather and Textile Finishing

Others

Companies Profiled:

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

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Polyurethane Dispersions (PUDs) Introduction
- 1.2 World Polyurethane Dispersions (PUDs) Supply & Forecast
 - 1.2.1 World Polyurethane Dispersions (PUDs) Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Polyurethane Dispersions (PUDs) Production (2021-2032)
 - 1.2.3 World Polyurethane Dispersions (PUDs) Pricing Trends (2021-2032)
- 1.3 World Polyurethane Dispersions (PUDs) Production by Region (Based on Production Site)
 - 1.3.1 World Polyurethane Dispersions (PUDs) Production Value by Region (2021-2032)
 - 1.3.2 World Polyurethane Dispersions (PUDs) Production by Region (2021-2032)
 - 1.3.3 World Polyurethane Dispersions (PUDs) Average Price by Region (2021-2032)
 - 1.3.4 North America Polyurethane Dispersions (PUDs) Production (2021-2032)
 - 1.3.5 Europe Polyurethane Dispersions (PUDs) Production (2021-2032)
 - 1.3.6 China Polyurethane Dispersions (PUDs) Production (2021-2032)
 - 1.3.7 Japan Polyurethane Dispersions (PUDs) Production (2021-2032)
 - 1.3.8 India Polyurethane Dispersions (PUDs) Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Polyurethane Dispersions (PUDs) Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Polyurethane Dispersions (PUDs) Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Polyurethane Dispersions (PUDs) Demand (2021-2032)
- 2.2 World Polyurethane Dispersions (PUDs) Consumption by Region
 - 2.2.1 World Polyurethane Dispersions (PUDs) Consumption by Region (2021-2026)
 - 2.2.2 World Polyurethane Dispersions (PUDs) Consumption Forecast by Region (2027-2032)
- 2.3 United States Polyurethane Dispersions (PUDs) Consumption (2021-2032)
- 2.4 China Polyurethane Dispersions (PUDs) Consumption (2021-2032)
- 2.5 Europe Polyurethane Dispersions (PUDs) Consumption (2021-2032)
- 2.6 Japan Polyurethane Dispersions (PUDs) Consumption (2021-2032)
- 2.7 South Korea Polyurethane Dispersions (PUDs) Consumption (2021-2032)
- 2.8 ASEAN Polyurethane Dispersions (PUDs) Consumption (2021-2032)
- 2.9 India Polyurethane Dispersions (PUDs) Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Polyurethane Dispersions (PUDs) Production Value by Manufacturer (2021-2026)

3.2 World Polyurethane Dispersions (PUDs) Production by Manufacturer (2021-2026)

3.3 World Polyurethane Dispersions (PUDs) Average Price by Manufacturer (2021-2026)

3.4 Polyurethane Dispersions (PUDs) Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Polyurethane Dispersions (PUDs) Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Polyurethane Dispersions (PUDs) in 2025

3.5.3 Global Concentration Ratios (CR8) for Polyurethane Dispersions (PUDs) in 2025

3.6 Polyurethane Dispersions (PUDs) Market: Overall Company Footprint Analysis

3.6.1 Polyurethane Dispersions (PUDs) Market: Region Footprint

3.6.2 Polyurethane Dispersions (PUDs) Market: Company Product Type Footprint

3.6.3 Polyurethane Dispersions (PUDs) Market: Company Product Application

Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Polyurethane Dispersions (PUDs) Production Value Comparison

4.1.1 United States VS China: Polyurethane Dispersions (PUDs) Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Polyurethane Dispersions (PUDs) Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Polyurethane Dispersions (PUDs) Production Comparison

4.2.1 United States VS China: Polyurethane Dispersions (PUDs) Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Polyurethane Dispersions (PUDs) Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Polyurethane Dispersions (PUDs) Consumption

Comparison

4.3.1 United States VS China: Polyurethane Dispersions (PUDs) Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Polyurethane Dispersions (PUDs) Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Polyurethane Dispersions (PUDs) Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Polyurethane Dispersions (PUDs) Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Polyurethane Dispersions (PUDs) Production Value (2021-2026)

4.4.3 United States Based Manufacturers Polyurethane Dispersions (PUDs) Production (2021-2026)

4.5 China Based Polyurethane Dispersions (PUDs) Manufacturers and Market Share

4.5.1 China Based Polyurethane Dispersions (PUDs) Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Polyurethane Dispersions (PUDs) Production Value (2021-2026)

4.5.3 China Based Manufacturers Polyurethane Dispersions (PUDs) Production (2021-2026)

4.6 Rest of World Based Polyurethane Dispersions (PUDs) Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Polyurethane Dispersions (PUDs) Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Polyurethane Dispersions (PUDs) Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Waterborne Dispersion

5.2.2 Solvent Assisted Dispersion

5.2.3 Specialty Low Solvent Dispersion

5.3 Market Segment by Type

5.3.1 World Polyurethane Dispersions (PUDs) Production by Type (2021-2032)

5.3.2 World Polyurethane Dispersions (PUDs) Production Value by Type (2021-2032)

5.3.3 World Polyurethane Dispersions (PUDs) Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY IONIC TYPE

6.1 World Polyurethane Dispersions (PUDs) Market Size Overview by Ionic Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Ionic Type

6.2.1 Anionic PUDs

6.2.2 Cationic PUDs

6.2.3 Nonionic PUDs

6.2.4 Others

6.3 Market Segment by Ionic Type

6.3.1 World Polyurethane Dispersions (PUDs) Production by Ionic Type (2021-2032)

6.3.2 World Polyurethane Dispersions (PUDs) Production Value by Ionic Type (2021-2032)

6.3.3 World Polyurethane Dispersions (PUDs) Average Price by Ionic Type (2021-2032)

7 MARKET ANALYSIS BY PRODUCT CHEMISTRY

7.1 World Polyurethane Dispersions (PUDs) Market Size Overview by Product Chemistry: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Product Chemistry

7.2.1 Polyester Based PUDs

7.2.2 Polyether Based PUDs

7.2.3 Polycarbonate Based PUDs

7.2.4 Others

7.3 Market Segment by Product Chemistry

7.3.1 World Polyurethane Dispersions (PUDs) Production by Product Chemistry (2021-2032)

7.3.2 World Polyurethane Dispersions (PUDs) Production Value by Product Chemistry (2021-2032)

7.3.3 World Polyurethane Dispersions (PUDs) Average Price by Product Chemistry (2021-2032)

8 MARKET ANALYSIS BY RAW MATERIAL SYSTEM

8.1 World Polyurethane Dispersions (PUDs) Market Size Overview by Raw Material

System: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Raw Material System

8.2.1 Aromatic Isocyanate Based PUDs

8.2.2 Aliphatic Isocyanate Based PUDs

8.2.3 Bio Based PUDs

8.3 Market Segment by Raw Material System

8.3.1 World Polyurethane Dispersions (PUDs) Production by Raw Material System (2021-2032)

8.3.2 World Polyurethane Dispersions (PUDs) Production Value by Raw Material System (2021-2032)

8.3.3 World Polyurethane Dispersions (PUDs) Average Price by Raw Material System (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Polyurethane Dispersions (PUDs) Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Coatings

9.2.2 Adhesives and Sealants

9.2.3 Synthetic Leather and Textile Finishing

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Polyurethane Dispersions (PUDs) Production by Application (2021-2032)

9.3.2 World Polyurethane Dispersions (PUDs) Production Value by Application (2021-2032)

9.3.3 World Polyurethane Dispersions (PUDs) Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Covestro AG

10.1.1 Covestro AG Details

10.1.2 Covestro AG Major Business

10.1.3 Covestro AG Polyurethane Dispersions (PUDs) Product and Services

10.1.4 Covestro AG Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Covestro AG Recent Developments/Updates

10.1.6 Covestro AG Competitive Strengths & Weaknesses

10.2 BASF SE

10.2.1 BASF SE Details

10.2.2 BASF SE Major Business

10.2.3 BASF SE Polyurethane Dispersions (PUDs) Product and Services

10.2.4 BASF SE Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 BASF SE Recent Developments/Updates

10.2.6 BASF SE Competitive Strengths & Weaknesses

10.3 Stahl Holdings B.V.

10.3.1 Stahl Holdings B.V. Details

10.3.2 Stahl Holdings B.V. Major Business

10.3.3 Stahl Holdings B.V. Polyurethane Dispersions (PUDs) Product and Services

10.3.4 Stahl Holdings B.V. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Stahl Holdings B.V. Recent Developments/Updates

10.3.6 Stahl Holdings B.V. Competitive Strengths & Weaknesses

10.4 Alberdingk Boley GmbH

10.4.1 Alberdingk Boley GmbH Details

10.4.2 Alberdingk Boley GmbH Major Business

10.4.3 Alberdingk Boley GmbH Polyurethane Dispersions (PUDs) Product and Services

10.4.4 Alberdingk Boley GmbH Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 Alberdingk Boley GmbH Recent Developments/Updates

10.4.6 Alberdingk Boley GmbH Competitive Strengths & Weaknesses

10.5 allnex GmbH

10.5.1 allnex GmbH Details

10.5.2 allnex GmbH Major Business

10.5.3 allnex GmbH Polyurethane Dispersions (PUDs) Product and Services

10.5.4 allnex GmbH Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.5.5 allnex GmbH Recent Developments/Updates

10.5.6 allnex GmbH Competitive Strengths & Weaknesses

10.6 Lamberti S.p.A.

10.6.1 Lamberti S.p.A. Details

10.6.2 Lamberti S.p.A. Major Business

10.6.3 Lamberti S.p.A. Polyurethane Dispersions (PUDs) Product and Services

10.6.4 Lamberti S.p.A. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 10.6.5 Lamberti S.p.A. Recent Developments/Updates
- 10.6.6 Lamberti S.p.A. Competitive Strengths & Weaknesses
- 10.7 Lubrizol Corporation
 - 10.7.1 Lubrizol Corporation Details
 - 10.7.2 Lubrizol Corporation Major Business
 - 10.7.3 Lubrizol Corporation Polyurethane Dispersions (PUDs) Product and Services
 - 10.7.4 Lubrizol Corporation Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.7.5 Lubrizol Corporation Recent Developments/Updates
 - 10.7.6 Lubrizol Corporation Competitive Strengths & Weaknesses
- 10.8 Hawthaway Corporation
 - 10.8.1 Hawthaway Corporation Details
 - 10.8.2 Hawthaway Corporation Major Business
 - 10.8.3 Hawthaway Corporation Polyurethane Dispersions (PUDs) Product and Services
 - 10.8.4 Hawthaway Corporation Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.8.5 Hawthaway Corporation Recent Developments/Updates
 - 10.8.6 Hawthaway Corporation Competitive Strengths & Weaknesses
- 10.9 Michelman, Inc.
 - 10.9.1 Michelman, Inc. Details
 - 10.9.2 Michelman, Inc. Major Business
 - 10.9.3 Michelman, Inc. Polyurethane Dispersions (PUDs) Product and Services
 - 10.9.4 Michelman, Inc. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.9.5 Michelman, Inc. Recent Developments/Updates
 - 10.9.6 Michelman, Inc. Competitive Strengths & Weaknesses
- 10.10 Chase Corporation
 - 10.10.1 Chase Corporation Details
 - 10.10.2 Chase Corporation Major Business
 - 10.10.3 Chase Corporation Polyurethane Dispersions (PUDs) Product and Services
 - 10.10.4 Chase Corporation Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.10.5 Chase Corporation Recent Developments/Updates
 - 10.10.6 Chase Corporation Competitive Strengths & Weaknesses
- 10.11 Sika AG
 - 10.11.1 Sika AG Details
 - 10.11.2 Sika AG Major Business
 - 10.11.3 Sika AG Polyurethane Dispersions (PUDs) Product and Services

10.11.4 Sika AG Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.11.5 Sika AG Recent Developments/Updates

10.11.6 Sika AG Competitive Strengths & Weaknesses

10.12 UBE Corporation

10.12.1 UBE Corporation Details

10.12.2 UBE Corporation Major Business

10.12.3 UBE Corporation Polyurethane Dispersions (PUDs) Product and Services

10.12.4 UBE Corporation Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 UBE Corporation Recent Developments/Updates

10.12.6 UBE Corporation Competitive Strengths & Weaknesses

10.13 DIC Corporation

10.13.1 DIC Corporation Details

10.13.2 DIC Corporation Major Business

10.13.3 DIC Corporation Polyurethane Dispersions (PUDs) Product and Services

10.13.4 DIC Corporation Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.13.5 DIC Corporation Recent Developments/Updates

10.13.6 DIC Corporation Competitive Strengths & Weaknesses

10.14 Mitsui Chemicals, Inc.

10.14.1 Mitsui Chemicals, Inc. Details

10.14.2 Mitsui Chemicals, Inc. Major Business

10.14.3 Mitsui Chemicals, Inc. Polyurethane Dispersions (PUDs) Product and Services

10.14.4 Mitsui Chemicals, Inc. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.14.5 Mitsui Chemicals, Inc. Recent Developments/Updates

10.14.6 Mitsui Chemicals, Inc. Competitive Strengths & Weaknesses

10.15 Wanhua Chemical Group Co., Ltd.

10.15.1 Wanhua Chemical Group Co., Ltd. Details

10.15.2 Wanhua Chemical Group Co., Ltd. Major Business

10.15.3 Wanhua Chemical Group Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

10.15.4 Wanhua Chemical Group Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.15.5 Wanhua Chemical Group Co., Ltd. Recent Developments/Updates

10.15.6 Wanhua Chemical Group Co., Ltd. Competitive Strengths & Weaknesses

10.16 Huaфон Group Co., Ltd.

10.16.1 Huaфон Group Co., Ltd. Details

- 10.16.2 Huafon Group Co., Ltd. Major Business
- 10.16.3 Huafon Group Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services
- 10.16.4 Huafon Group Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.16.5 Huafon Group Co., Ltd. Recent Developments/Updates
- 10.16.6 Huafon Group Co., Ltd. Competitive Strengths & Weaknesses
- 10.17 Hefei Ketian Waterborne Technology Co., Ltd.
 - 10.17.1 Hefei Ketian Waterborne Technology Co., Ltd. Details
 - 10.17.2 Hefei Ketian Waterborne Technology Co., Ltd. Major Business
 - 10.17.3 Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services
 - 10.17.4 Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.17.5 Hefei Ketian Waterborne Technology Co., Ltd. Recent Developments/Updates
 - 10.17.6 Hefei Ketian Waterborne Technology Co., Ltd. Competitive Strengths & Weaknesses
- 10.18 Anhui Sinograce Chemical Co., Ltd.
 - 10.18.1 Anhui Sinograce Chemical Co., Ltd. Details
 - 10.18.2 Anhui Sinograce Chemical Co., Ltd. Major Business
 - 10.18.3 Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services
 - 10.18.4 Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.18.5 Anhui Sinograce Chemical Co., Ltd. Recent Developments/Updates
 - 10.18.6 Anhui Sinograce Chemical Co., Ltd. Competitive Strengths & Weaknesses
- 10.19 Guangzhou SIO New Material Co., Ltd.
 - 10.19.1 Guangzhou SIO New Material Co., Ltd. Details
 - 10.19.2 Guangzhou SIO New Material Co., Ltd. Major Business
 - 10.19.3 Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services
 - 10.19.4 Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.19.5 Guangzhou SIO New Material Co., Ltd. Recent Developments/Updates
 - 10.19.6 Guangzhou SIO New Material Co., Ltd. Competitive Strengths & Weaknesses
- 10.20 Dongsung Chemical Co., Ltd.
 - 10.20.1 Dongsung Chemical Co., Ltd. Details
 - 10.20.2 Dongsung Chemical Co., Ltd. Major Business
 - 10.20.3 Dongsung Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Product and

Services

10.20.4 Dongsung Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.20.5 Dongsung Chemical Co., Ltd. Recent Developments/Updates

10.20.6 Dongsung Chemical Co., Ltd. Competitive Strengths & Weaknesses

10.21 Eternal Materials Co., Ltd.

10.21.1 Eternal Materials Co., Ltd. Details

10.21.2 Eternal Materials Co., Ltd. Major Business

10.21.3 Eternal Materials Co., Ltd. Polyurethane Dispersions (PUDs) Product and

Services

10.21.4 Eternal Materials Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.21.5 Eternal Materials Co., Ltd. Recent Developments/Updates

10.21.6 Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses

10.22 Chansieh Enterprises Co., Ltd.

10.22.1 Chansieh Enterprises Co., Ltd. Details

10.22.2 Chansieh Enterprises Co., Ltd. Major Business

10.22.3 Chansieh Enterprises Co., Ltd. Polyurethane Dispersions (PUDs) Product and

Services

10.22.4 Chansieh Enterprises Co., Ltd. Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.22.5 Chansieh Enterprises Co., Ltd. Recent Developments/Updates

10.22.6 Chansieh Enterprises Co., Ltd. Competitive Strengths & Weaknesses

10.23 Pidilite Industries Limited

10.23.1 Pidilite Industries Limited Details

10.23.2 Pidilite Industries Limited Major Business

10.23.3 Pidilite Industries Limited Polyurethane Dispersions (PUDs) Product and

Services

10.23.4 Pidilite Industries Limited Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.23.5 Pidilite Industries Limited Recent Developments/Updates

10.23.6 Pidilite Industries Limited Competitive Strengths & Weaknesses

10.24 Texochem Industries

10.24.1 Texochem Industries Details

10.24.2 Texochem Industries Major Business

10.24.3 Texochem Industries Polyurethane Dispersions (PUDs) Product and Services

10.24.4 Texochem Industries Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.24.5 Texochem Industries Recent Developments/Updates

- 10.24.6 Texochem Industries Competitive Strengths & Weaknesses
- 10.25 VICHEM Joint Stock Company
 - 10.25.1 VICHEM Joint Stock Company Details
 - 10.25.2 VICHEM Joint Stock Company Major Business
 - 10.25.3 VICHEM Joint Stock Company Polyurethane Dispersions (PUDs) Product and Services
 - 10.25.4 VICHEM Joint Stock Company Polyurethane Dispersions (PUDs) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.25.5 VICHEM Joint Stock Company Recent Developments/Updates
 - 10.25.6 VICHEM Joint Stock Company Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

- 11.1 Polyurethane Dispersions (PUDs) Industry Chain
- 11.2 Polyurethane Dispersions (PUDs) Upstream Analysis
 - 11.2.1 Polyurethane Dispersions (PUDs) Core Raw Materials
 - 11.2.2 Main Manufacturers of Polyurethane Dispersions (PUDs) Core Raw Materials
- 11.3 Midstream Analysis
- 11.4 Downstream Analysis
- 11.5 Polyurethane Dispersions (PUDs) Production Mode
- 11.6 Polyurethane Dispersions (PUDs) Procurement Model
- 11.7 Polyurethane Dispersions (PUDs) Industry Sales Model and Sales Channels
 - 11.7.1 Polyurethane Dispersions (PUDs) Sales Model
 - 11.7.2 Polyurethane Dispersions (PUDs) Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

- 13.1 Methodology
- 13.2 Research Process and Data Source
- 13.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Polyurethane Dispersions (PUDs) Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Polyurethane Dispersions (PUDs) Production Value by Region (2021-2026) & (USD Million)

Table 3. World Polyurethane Dispersions (PUDs) Production Value by Region (2027-2032) & (USD Million)

Table 4. World Polyurethane Dispersions (PUDs) Production Value Market Share by Region (2021-2026)

Table 5. World Polyurethane Dispersions (PUDs) Production Value Market Share by Region (2027-2032)

Table 6. World Polyurethane Dispersions (PUDs) Production by Region (2021-2026) & (K MT)

Table 7. World Polyurethane Dispersions (PUDs) Production by Region (2027-2032) & (K MT)

Table 8. World Polyurethane Dispersions (PUDs) Production Market Share by Region (2021-2026)

Table 9. World Polyurethane Dispersions (PUDs) Production Market Share by Region (2027-2032)

Table 10. World Polyurethane Dispersions (PUDs) Average Price by Region (2021-2026) & (USD/MT)

Table 11. World Polyurethane Dispersions (PUDs) Average Price by Region (2027-2032) & (USD/MT)

Table 12. Polyurethane Dispersions (PUDs) Major Market Trends

Table 13. World Polyurethane Dispersions (PUDs) Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K MT)

Table 14. World Polyurethane Dispersions (PUDs) Consumption by Region (2021-2026) & (K MT)

Table 15. World Polyurethane Dispersions (PUDs) Consumption Forecast by Region (2027-2032) & (K MT)

Table 16. World Polyurethane Dispersions (PUDs) Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Polyurethane Dispersions (PUDs) Producers in 2025

Table 18. World Polyurethane Dispersions (PUDs) Production by Manufacturer (2021-2026) & (K MT)

Table 19. Production Market Share of Key Polyurethane Dispersions (PUDs) Producers in 2025

Table 20. World Polyurethane Dispersions (PUDs) Average Price by Manufacturer (2021-2026) & (USD/MT)

Table 21. Global Polyurethane Dispersions (PUDs) Company Evaluation Quadrant

Table 22. World Polyurethane Dispersions (PUDs) Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Polyurethane Dispersions (PUDs) Production Site of Key Manufacturer

Table 24. Polyurethane Dispersions (PUDs) Market: Company Product Type Footprint

Table 25. Polyurethane Dispersions (PUDs) Market: Company Product Application Footprint

Table 26. Polyurethane Dispersions (PUDs) Competitive Factors

Table 27. Polyurethane Dispersions (PUDs) New Entrant and Capacity Expansion Plans

Table 28. Polyurethane Dispersions (PUDs) Mergers & Acquisitions Activity

Table 29. United States VS China Polyurethane Dispersions (PUDs) Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Polyurethane Dispersions (PUDs) Production Comparison, (2021 & 2025 & 2032) & (K MT)

Table 31. United States VS China Polyurethane Dispersions (PUDs) Consumption Comparison, (2021 & 2025 & 2032) & (K MT)

Table 32. United States Based Polyurethane Dispersions (PUDs) Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Polyurethane Dispersions (PUDs) Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Polyurethane Dispersions (PUDs) Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Polyurethane Dispersions (PUDs) Production (2021-2026) & (K MT)

Table 36. United States Based Manufacturers Polyurethane Dispersions (PUDs) Production Market Share (2021-2026)

Table 37. China Based Polyurethane Dispersions (PUDs) Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Polyurethane Dispersions (PUDs) Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Polyurethane Dispersions (PUDs) Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Polyurethane Dispersions (PUDs) Production,

(2021-2026) & (K MT)

Table 41. China Based Manufacturers Polyurethane Dispersions (PUDs) Production Market Share (2021-2026)

Table 42. Rest of World Based Polyurethane Dispersions (PUDs) Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production, (2021-2026) & (K MT)

Table 46. Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production Market Share (2021-2026)

Table 47. World Polyurethane Dispersions (PUDs) Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Polyurethane Dispersions (PUDs) Production by Type (2021-2026) & (K MT)

Table 49. World Polyurethane Dispersions (PUDs) Production by Type (2027-2032) & (K MT)

Table 50. World Polyurethane Dispersions (PUDs) Production Value by Type (2021-2026) & (USD Million)

Table 51. World Polyurethane Dispersions (PUDs) Production Value by Type (2027-2032) & (USD Million)

Table 52. World Polyurethane Dispersions (PUDs) Average Price by Type (2021-2026) & (USD/MT)

Table 53. World Polyurethane Dispersions (PUDs) Average Price by Type (2027-2032) & (USD/MT)

Table 54. World Polyurethane Dispersions (PUDs) Production Value by Ionic Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Polyurethane Dispersions (PUDs) Production by Ionic Type (2021-2026) & (K MT)

Table 56. World Polyurethane Dispersions (PUDs) Production by Ionic Type (2027-2032) & (K MT)

Table 57. World Polyurethane Dispersions (PUDs) Production Value by Ionic Type (2021-2026) & (USD Million)

Table 58. World Polyurethane Dispersions (PUDs) Production Value by Ionic Type (2027-2032) & (USD Million)

Table 59. World Polyurethane Dispersions (PUDs) Average Price by Ionic Type (2021-2026) & (USD/MT)

Table 60. World Polyurethane Dispersions (PUDs) Average Price by Ionic Type (2027-2032) & (USD/MT)

Table 61. World Polyurethane Dispersions (PUDs) Production Value by Product Chemistry, (USD Million), 2021 & 2025 & 2032

Table 62. World Polyurethane Dispersions (PUDs) Production by Product Chemistry (2021-2026) & (K MT)

Table 63. World Polyurethane Dispersions (PUDs) Production by Product Chemistry (2027-2032) & (K MT)

Table 64. World Polyurethane Dispersions (PUDs) Production Value by Product Chemistry (2021-2026) & (USD Million)

Table 65. World Polyurethane Dispersions (PUDs) Production Value by Product Chemistry (2027-2032) & (USD Million)

Table 66. World Polyurethane Dispersions (PUDs) Average Price by Product Chemistry (2021-2026) & (USD/MT)

Table 67. World Polyurethane Dispersions (PUDs) Average Price by Product Chemistry (2027-2032) & (USD/MT)

Table 68. World Polyurethane Dispersions (PUDs) Production Value by Raw Material System, (USD Million), 2021 & 2025 & 2032

Table 69. World Polyurethane Dispersions (PUDs) Production by Raw Material System (2021-2026) & (K MT)

Table 70. World Polyurethane Dispersions (PUDs) Production by Raw Material System (2027-2032) & (K MT)

Table 71. World Polyurethane Dispersions (PUDs) Production Value by Raw Material System (2021-2026) & (USD Million)

Table 72. World Polyurethane Dispersions (PUDs) Production Value by Raw Material System (2027-2032) & (USD Million)

Table 73. World Polyurethane Dispersions (PUDs) Average Price by Raw Material System (2021-2026) & (USD/MT)

Table 74. World Polyurethane Dispersions (PUDs) Average Price by Raw Material System (2027-2032) & (USD/MT)

Table 75. World Polyurethane Dispersions (PUDs) Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Polyurethane Dispersions (PUDs) Production by Application (2021-2026) & (K MT)

Table 77. World Polyurethane Dispersions (PUDs) Production by Application (2027-2032) & (K MT)

Table 78. World Polyurethane Dispersions (PUDs) Production Value by Application (2021-2026) & (USD Million)

Table 79. World Polyurethane Dispersions (PUDs) Production Value by Application

(2027-2032) & (USD Million)

Table 80. World Polyurethane Dispersions (PUDs) Average Price by Application (2021-2026) & (USD/MT)

Table 81. World Polyurethane Dispersions (PUDs) Average Price by Application (2027-2032) & (USD/MT)

Table 82. Covestro AG Basic Information, Manufacturing Base and Competitors

Table 83. Covestro AG Major Business

Table 84. Covestro AG Polyurethane Dispersions (PUDs) Product and Services

Table 85. Covestro AG Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Covestro AG Recent Developments/Updates

Table 87. Covestro AG Competitive Strengths & Weaknesses

Table 88. BASF SE Basic Information, Manufacturing Base and Competitors

Table 89. BASF SE Major Business

Table 90. BASF SE Polyurethane Dispersions (PUDs) Product and Services

Table 91. BASF SE Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. BASF SE Recent Developments/Updates

Table 93. BASF SE Competitive Strengths & Weaknesses

Table 94. Stahl Holdings B.V. Basic Information, Manufacturing Base and Competitors

Table 95. Stahl Holdings B.V. Major Business

Table 96. Stahl Holdings B.V. Polyurethane Dispersions (PUDs) Product and Services

Table 97. Stahl Holdings B.V. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Stahl Holdings B.V. Recent Developments/Updates

Table 99. Stahl Holdings B.V. Competitive Strengths & Weaknesses

Table 100. Alberdingk Boley GmbH Basic Information, Manufacturing Base and Competitors

Table 101. Alberdingk Boley GmbH Major Business

Table 102. Alberdingk Boley GmbH Polyurethane Dispersions (PUDs) Product and Services

Table 103. Alberdingk Boley GmbH Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Alberdingk Boley GmbH Recent Developments/Updates

Table 105. Alberdingk Boley GmbH Competitive Strengths & Weaknesses

Table 106. allnex GmbH Basic Information, Manufacturing Base and Competitors

Table 107. allnex GmbH Major Business

Table 108. allnex GmbH Polyurethane Dispersions (PUDs) Product and Services

Table 109. allnex GmbH Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. allnex GmbH Recent Developments/Updates

Table 111. allnex GmbH Competitive Strengths & Weaknesses

Table 112. Lamberti S.p.A. Basic Information, Manufacturing Base and Competitors

Table 113. Lamberti S.p.A. Major Business

Table 114. Lamberti S.p.A. Polyurethane Dispersions (PUDs) Product and Services

Table 115. Lamberti S.p.A. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Lamberti S.p.A. Recent Developments/Updates

Table 117. Lamberti S.p.A. Competitive Strengths & Weaknesses

Table 118. Lubrizol Corporation Basic Information, Manufacturing Base and Competitors

Table 119. Lubrizol Corporation Major Business

Table 120. Lubrizol Corporation Polyurethane Dispersions (PUDs) Product and Services

Table 121. Lubrizol Corporation Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Lubrizol Corporation Recent Developments/Updates

Table 123. Lubrizol Corporation Competitive Strengths & Weaknesses

Table 124. Hawthaway Corporation Basic Information, Manufacturing Base and Competitors

Table 125. Hawthaway Corporation Major Business

Table 126. Hawthaway Corporation Polyurethane Dispersions (PUDs) Product and Services

Table 127. Hawthaway Corporation Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Hawthaway Corporation Recent Developments/Updates

Table 129. Hawthaway Corporation Competitive Strengths & Weaknesses

Table 130. Michelman, Inc. Basic Information, Manufacturing Base and Competitors

Table 131. Michelman, Inc. Major Business

Table 132. Michelman, Inc. Polyurethane Dispersions (PUDs) Product and Services

Table 133. Michelman, Inc. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Michelman, Inc. Recent Developments/Updates

Table 135. Michelman, Inc. Competitive Strengths & Weaknesses

Table 136. Chase Corporation Basic Information, Manufacturing Base and Competitors

Table 137. Chase Corporation Major Business

Table 138. Chase Corporation Polyurethane Dispersions (PUDs) Product and Services

Table 139. Chase Corporation Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Chase Corporation Recent Developments/Updates

Table 141. Chase Corporation Competitive Strengths & Weaknesses

Table 142. Sika AG Basic Information, Manufacturing Base and Competitors

Table 143. Sika AG Major Business

Table 144. Sika AG Polyurethane Dispersions (PUDs) Product and Services

Table 145. Sika AG Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Sika AG Recent Developments/Updates

Table 147. Sika AG Competitive Strengths & Weaknesses

Table 148. UBE Corporation Basic Information, Manufacturing Base and Competitors

Table 149. UBE Corporation Major Business

Table 150. UBE Corporation Polyurethane Dispersions (PUDs) Product and Services

Table 151. UBE Corporation Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. UBE Corporation Recent Developments/Updates

Table 153. UBE Corporation Competitive Strengths & Weaknesses

Table 154. DIC Corporation Basic Information, Manufacturing Base and Competitors

Table 155. DIC Corporation Major Business

Table 156. DIC Corporation Polyurethane Dispersions (PUDs) Product and Services

Table 157. DIC Corporation Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. DIC Corporation Recent Developments/Updates

Table 159. DIC Corporation Competitive Strengths & Weaknesses

Table 160. Mitsui Chemicals, Inc. Basic Information, Manufacturing Base and Competitors

Table 161. Mitsui Chemicals, Inc. Major Business

Table 162. Mitsui Chemicals, Inc. Polyurethane Dispersions (PUDs) Product and Services

Table 163. Mitsui Chemicals, Inc. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Mitsui Chemicals, Inc. Recent Developments/Updates

Table 165. Mitsui Chemicals, Inc. Competitive Strengths & Weaknesses

Table 166. Wanhua Chemical Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 167. Wanhua Chemical Group Co., Ltd. Major Business

Table 168. Wanhua Chemical Group Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 169. Wanhua Chemical Group Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Wanhua Chemical Group Co., Ltd. Recent Developments/Updates

Table 171. Wanhua Chemical Group Co., Ltd. Competitive Strengths & Weaknesses

Table 172. Huaфон Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 173. Huaфон Group Co., Ltd. Major Business

Table 174. Huaфон Group Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 175. Huaфон Group Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. Huaфон Group Co., Ltd. Recent Developments/Updates

Table 177. Huaфон Group Co., Ltd. Competitive Strengths & Weaknesses

Table 178. Hefei Ketian Waterborne Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 179. Hefei Ketian Waterborne Technology Co., Ltd. Major Business

Table 180. Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 181. Hefei Ketian Waterborne Technology Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. Hefei Ketian Waterborne Technology Co., Ltd. Recent Developments/Updates

Table 183. Hefei Ketian Waterborne Technology Co., Ltd. Competitive Strengths &

Weaknesses

Table 184. Anhui Sinograce Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 185. Anhui Sinograce Chemical Co., Ltd. Major Business

Table 186. Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 187. Anhui Sinograce Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Anhui Sinograce Chemical Co., Ltd. Recent Developments/Updates

Table 189. Anhui Sinograce Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 190. Guangzhou SIO New Material Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 191. Guangzhou SIO New Material Co., Ltd. Major Business

Table 192. Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 193. Guangzhou SIO New Material Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 194. Guangzhou SIO New Material Co., Ltd. Recent Developments/Updates

Table 195. Guangzhou SIO New Material Co., Ltd. Competitive Strengths & Weaknesses

Table 196. Dongsung Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 197. Dongsung Chemical Co., Ltd. Major Business

Table 198. Dongsung Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 199. Dongsung Chemical Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 200. Dongsung Chemical Co., Ltd. Recent Developments/Updates

Table 201. Dongsung Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 202. Eternal Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 203. Eternal Materials Co., Ltd. Major Business

Table 204. Eternal Materials Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 205. Eternal Materials Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 206. Eternal Materials Co., Ltd. Recent Developments/Updates

Table 207. Eternal Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 208. Chansieh Enterprises Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 209. Chansieh Enterprises Co., Ltd. Major Business

Table 210. Chansieh Enterprises Co., Ltd. Polyurethane Dispersions (PUDs) Product and Services

Table 211. Chansieh Enterprises Co., Ltd. Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Chansieh Enterprises Co., Ltd. Recent Developments/Updates

Table 213. Chansieh Enterprises Co., Ltd. Competitive Strengths & Weaknesses

Table 214. Pidilite Industries Limited Basic Information, Manufacturing Base and Competitors

Table 215. Pidilite Industries Limited Major Business

Table 216. Pidilite Industries Limited Polyurethane Dispersions (PUDs) Product and Services

Table 217. Pidilite Industries Limited Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 218. Pidilite Industries Limited Recent Developments/Updates

Table 219. Pidilite Industries Limited Competitive Strengths & Weaknesses

Table 220. Texochem Industries Basic Information, Manufacturing Base and Competitors

Table 221. Texochem Industries Major Business

Table 222. Texochem Industries Polyurethane Dispersions (PUDs) Product and Services

Table 223. Texochem Industries Polyurethane Dispersions (PUDs) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 224. Texochem Industries Recent Developments/Updates

Table 225. Texochem Industries Competitive Strengths & Weaknesses

Table 226. VICHEM Joint Stock Company Basic Information, Manufacturing Base and Competitors

Table 227. VICHEM Joint Stock Company Major Business

Table 228. VICHEM Joint Stock Company Polyurethane Dispersions (PUDs) Product and Services

Table 229. VICHEM Joint Stock Company Polyurethane Dispersions (PUDs) Production

(K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 230. VICHEM Joint Stock Company Recent Developments/Updates

Table 231. VICHEM Joint Stock Company Competitive Strengths & Weaknesses

Table 232. Global Key Players of Polyurethane Dispersions (PUDs) Upstream (Raw Materials)

Table 233. Global Polyurethane Dispersions (PUDs) Typical Customers

Table 234. Polyurethane Dispersions (PUDs) Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Polyurethane Dispersions (PUDs) Picture

Figure 2. World Polyurethane Dispersions (PUDs) Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Polyurethane Dispersions (PUDs) Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Polyurethane Dispersions (PUDs) Production (2021-2032) & (K MT)

Figure 5. World Polyurethane Dispersions (PUDs) Average Price (2021-2032) & (USD/MT)

Figure 6. World Polyurethane Dispersions (PUDs) Production Value Market Share by Region (2021-2032)

Figure 7. World Polyurethane Dispersions (PUDs) Production Market Share by Region (2021-2032)

Figure 8. North America Polyurethane Dispersions (PUDs) Production (2021-2032) & (K MT)

Figure 9. Europe Polyurethane Dispersions (PUDs) Production (2021-2032) & (K MT)

Figure 10. China Polyurethane Dispersions (PUDs) Production (2021-2032) & (K MT)

Figure 11. Japan Polyurethane Dispersions (PUDs) Production (2021-2032) & (K MT)

Figure 12. India Polyurethane Dispersions (PUDs) Production (2021-2032) & (K MT)

Figure 13. Polyurethane Dispersions (PUDs) Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 16. World Polyurethane Dispersions (PUDs) Consumption Market Share by Region (2021-2032)

Figure 17. United States Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 18. China Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 19. Europe Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 20. Japan Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 21. South Korea Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 22. ASEAN Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 23. India Polyurethane Dispersions (PUDs) Consumption (2021-2032) & (K MT)

Figure 24. Producer Shipments of Polyurethane Dispersions (PUDs) by Manufacturer

Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Polyurethane Dispersions (PUDs) Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Polyurethane Dispersions (PUDs) Markets in 2025

Figure 27. United States VS China: Polyurethane Dispersions (PUDs) Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Polyurethane Dispersions (PUDs) Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Polyurethane Dispersions (PUDs) Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Polyurethane Dispersions (PUDs) Production Market Share 2025

Figure 31. China Based Manufacturers Polyurethane Dispersions (PUDs) Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Polyurethane Dispersions (PUDs) Production Market Share 2025

Figure 33. World Polyurethane Dispersions (PUDs) Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Polyurethane Dispersions (PUDs) Production Value Market Share by Type in 2025

Figure 35. Waterborne Dispersion

Figure 36. Solvent Assisted Dispersion

Figure 37. Specialty Low Solvent Dispersion

Figure 38. World Polyurethane Dispersions (PUDs) Production Market Share by Type (2021-2032)

Figure 39. World Polyurethane Dispersions (PUDs) Production Value Market Share by Type (2021-2032)

Figure 40. World Polyurethane Dispersions (PUDs) Average Price by Type (2021-2032) & (USD/MT)

Figure 41. World Polyurethane Dispersions (PUDs) Production Value by Ionic Type, (USD Million), 2021 & 2025 & 2032

Figure 42. World Polyurethane Dispersions (PUDs) Production Value Market Share by Ionic Type in 2025

Figure 43. Anionic PUDs

Figure 44. Cationic PUDs

Figure 45. Nonionic PUDs

Figure 46. Others

Figure 47. World Polyurethane Dispersions (PUDs) Production Market Share by Ionic

Type (2021-2032)

Figure 48. World Polyurethane Dispersions (PUDs) Production Value Market Share by Ionic Type (2021-2032)

Figure 49. World Polyurethane Dispersions (PUDs) Average Price by Ionic Type (2021-2032) & (USD/MT)

Figure 50. World Polyurethane Dispersions (PUDs) Production Value by Product Chemistry, (USD Million), 2021 & 2025 & 2032

Figure 51. World Polyurethane Dispersions (PUDs) Production Value Market Share by Product Chemistry in 2025

Figure 52. Polyester Based PUDs

Figure 53. Polyether Based PUDs

Figure 54. Polycarbonate Based PUDs

Figure 55. Others

Figure 56. World Polyurethane Dispersions (PUDs) Production Market Share by Product Chemistry (2021-2032)

Figure 57. World Polyurethane Dispersions (PUDs) Production Value Market Share by Product Chemistry (2021-2032)

Figure 58. World Polyurethane Dispersions (PUDs) Average Price by Product Chemistry (2021-2032) & (USD/MT)

Figure 59. World Polyurethane Dispersions (PUDs) Production Value by Raw Material System, (USD Million), 2021 & 2025 & 2032

Figure 60. World Polyurethane Dispersions (PUDs) Production Value Market Share by Raw Material System in 2025

Figure 61. Aromatic Isocyanate Based PUDs

Figure 62. Aliphatic Isocyanate Based PUDs

Figure 63. Bio Based PUDs

Figure 64. World Polyurethane Dispersions (PUDs) Production Market Share by Raw Material System (2021-2032)

Figure 65. World Polyurethane Dispersions (PUDs) Production Value Market Share by Raw Material System (2021-2032)

Figure 66. World Polyurethane Dispersions (PUDs) Average Price by Raw Material System (2021-2032) & (USD/MT)

Figure 67. World Polyurethane Dispersions (PUDs) Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 68. World Polyurethane Dispersions (PUDs) Production Value Market Share by Application in 2025

Figure 69. Coatings

Figure 70. Adhesives and Sealants

Figure 71. Synthetic Leather and Textile Finishing

Figure 72. Others

Figure 73. World Polyurethane Dispersions (PUDs) Production Market Share by Application (2021-2032)

Figure 74. World Polyurethane Dispersions (PUDs) Production Value Market Share by Application (2021-2032)

Figure 75. World Polyurethane Dispersions (PUDs) Average Price by Application (2021-2032) & (USD/MT)

Figure 76. Polyurethane Dispersions (PUDs) Industry Chain

Figure 77. Polyurethane Dispersions (PUDs) Procurement Model

Figure 78. Polyurethane Dispersions (PUDs) Sales Model

Figure 79. Polyurethane Dispersions (PUDs) Sales Channels, Direct Sales, and Distribution

Figure 80. Methodology

Figure 81. Research Process and Data Source

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