

Global PU Associative Thickener 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 PU Associative Thickener market size was valued at US\$ 1169 million in 2025 and is forecast to a readjusted size of US\$ 1964 million by 2032 with a CAGR of 7.6% during review period.

Polyurethane associative thickeners are nonionic synthetic rheology additives mainly composed of hydrophilic polyether or polyurethane segments with a small amount of hydrophobic end groups or side groups. They are commonly referred to as HEUR or PU thickeners. In waterborne coatings, inks, adhesives, and similar systems, they form reversible associative networks through interactions between hydrophobic groups and emulsion particles, pigments/fillers, and other hydrophobic components, increasing low-, medium-, or high-shear viscosity while improving leveling, sag resistance, film formation, brush feel, and anti-spattering performance. The product's gross margin is approximately 35%.

Demand for polyurethane associative thickeners is primarily driven by rheology upgrades in waterborne coating systems, especially architectural coatings, industrial coatings, wood coatings, and waterborne inks. Compared with traditional cellulose ethers and ASE/HASE thickeners, HEUR/PU associative thickeners are better suited to improving medium- and high-shear viscosity, leveling, gloss, brush feel, anti-spattering, and film fullness, giving them strong formulation value in mid- to high-end waterborne coatings. Buyers usually do not select products based only on price, but focus on target shear range, thickening efficiency, emulsion compatibility, active content, VOC/APEO/organotin status, and storage stability. Growth is mainly driven by three factors: continued global replacement of solvent-based systems by waterborne and low-VOC coatings; expanding architectural and industrial coating capacity in Asia, which

increases mid-range product consumption; and rising demand in Europe and North America for low-odor, APEO-free, organotin-free, and high-performance rheology additives, driving the product structure toward higher-priced grades. From a competitive perspective, this product belongs to an additive category with higher formulation-technology barriers than ordinary chemicals. Leading companies maintain relatively high margins through emulsion system compatibility expertise, application test data, and customer formulation lock-in. Short-term risks mainly include cyclical fluctuations in architectural coatings, changes in raw material costs such as polyethers and isocyanates, and substitution by HASE, HMPE, or inorganic rheology additives in low-end applications. However, polyurethane associative thickeners will still maintain strong growth potential in high-gloss, low-VOC, waterborne industrial coatings and high-application-performance architectural coatings.

This report is a detailed and comprehensive analysis for global PU Associative Thickener 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 PU Associative Thickener market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global PU Associative Thickener market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global PU Associative Thickener market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global PU Associative Thickener market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 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 PU Associative Thickener

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 PU Associative Thickener 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 Dow, BASF, Arkema, Elementis, Evonik, BYK, M?nzing, Milliken, Allnex, Lamberti, etc.

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

Market Segmentation

PU Associative Thickener 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

Low-Shear Thickener

Mid-Shear Thickener

High-Shear Thickener

Low-To-Mid Shear Thickener

Mid-To-High Shear Thickener

Broad-Spectrum Thickener

Market segment by Rheology Profile

Newtonian

Slightly Pseudoplastic

Strongly Pseudoplastic

Thixotropic

Balanced Flow-and-Sag Control

Market segment by Formulation Compatibility

Hydrophobic Latex Compatible

Acrylic Emulsion Compatible

Styrene-Acrylic Emulsion Compatible

Polyurethane Dispersion Compatible

Alkyd Emulsion Compatible

High-Pigment/PVC Compatible

Market segment by Application

Coatings

Waterborne Inks

Adhesives

Sealants

Construction Chemicals

Major players covered

Dow

BASF

Arkema

Elementis

Evonik

BYK

M?nzing

Milliken

Allnex

Lamberti

San Nopco

Tianjin Ruike Chemical

Anhui Sinograce Chemical

SIO New Material

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 PU Associative Thickener product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PU Associative Thickener, with price, sales quantity, revenue, and global market share of PU Associative Thickener from 2021 to 2026.

Chapter 3, the PU Associative Thickener competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PU Associative Thickener 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 PU Associative Thickener 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 PU Associative Thickener.

Chapter 14 and 15, to describe PU Associative Thickener sales channel, distributors, customers, research findings and conclusion.

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