

Global PU Associative Thickener Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PU Associative Thickener market size is expected to reach \$ 1964 million by 2032, rising at a market growth of 7.6% CAGR during the forecast period (2026-2032).

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 studies the global PU Associative Thickener production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global PU Associative Thickener total production and demand, 2021-2032, (kg)

Global PU Associative Thickener total production value, 2021-2032, (USD Million)

Global PU Associative Thickener production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global PU Associative Thickener consumption by region & country, CAGR, 2021-2032 & (kg)

U.S. VS China: PU Associative Thickener domestic production, consumption, key domestic manufacturers and share

Global PU Associative Thickener production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global PU Associative Thickener production by Type, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global PU Associative Thickener production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global PU Associative Thickener 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PU Associative Thickener market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (kg) and average price (US\$/kg) 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 PU Associative Thickener Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global PU Associative Thickener Market, Segmentation by Type:

Low-Shear Thickener

Mid-Shear Thickener

High-Shear Thickener

Low-To-Mid Shear Thickener

Mid-To-High Shear Thickener

Broad-Spectrum Thickener

Global PU Associative Thickener Market, Segmentation by Rheology Profile:

Newtonian

Slightly Pseudoplastic

Strongly Pseudoplastic

Thixotropic

Balanced Flow-and-Sag Control

Global PU Associative Thickener Market, Segmentation by Formulation Compatibility:

Hydrophobic Latex Compatible

Acrylic Emulsion Compatible

Styrene-Acrylic Emulsion Compatible

Polyurethane Dispersion Compatible

Alkyd Emulsion Compatible

High-Pigment/PVC Compatible

Global PU Associative Thickener Market, Segmentation by Application:

Coatings

Waterborne Inks

Adhesives

Sealants

Construction Chemicals

Companies Profiled:

Dow

BASF

Arkema

Elementis

Evonik

BYK

M?nzing

Milliken

Allnex

Lamberti

San Nopco

Tianjin Ruike Chemical

Anhui Sinograce Chemical

SIO New Material

Key Questions Answered:

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

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