

Global Water-based Antifoaming Agents Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Water-based Antifoaming Agents market size is expected to reach \$ 3671 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

Water-based Antifoaming Agents are functional additives used in water-based formulations and aqueous industrial processes to collapse existing foam, prevent foam formation, delay foam recurrence, and control entrained microbubbles. They function by disrupting foam-film structures, reducing foam stability, accelerating liquid drainage, and interfering with the stabilization of bubbles by surfactants. Major commercial technologies include silicone-based, polyether-modified silicone, polyether-based, mineral-oil-based, natural-oil-based, and organic-polymer-based products. They may be supplied as aqueous emulsions, water dispersions, liquid concentrates, high-active compounds, or free-flowing powders. The product range is defined by its use in aqueous systems and therefore includes non-aqueous concentrates and high-active compounds that are designed to be incorporated into water-based formulations. Products intended exclusively for solventborne, anhydrous oil-phase, or other non-aqueous systems are excluded.

Water-based Antifoaming Agents are widely used in waterborne coatings, printing inks, adhesives, polymer emulsions, pulp and paper, water and wastewater treatment, textile processing, industrial cleaning, metalworking fluids, construction chemicals, agrochemical formulations, food processing, and biological fermentation. Their principal functions are to reduce overflow, entrained air, residual microfoam, and foam recurrence while improving usable equipment capacity, pumping stability, filtration efficiency, production throughput, and finished-product surface quality.

The global Water-based Antifoaming Agents market is benefiting from the increasing penetration of waterborne formulations, the adoption of continuous industrial production, and tighter environmental compliance requirements. The transition of coatings, printing inks, adhesives, and polymer emulsions toward lower-emission and waterborne technologies is increasing foam-control requirements during high-speed dispersion, grinding, pumping, filling, storage, and application. Process industries such as pulp and paper, water treatment, textile processing, industrial cleaning, and metalworking are placing greater emphasis on usable equipment capacity, circulation stability, filtration speed, and total production cost. As a result, antifoaming agents are evolving from conventional auxiliary chemicals into process-critical additives that support production stability and finished-product quality. Food processing, biological fermentation, and agrochemical formulations are also creating stronger demand for low-dose, high-temperature-resistant, alkali-resistant, low-residue, and regulatory-compliant products. These requirements are supporting higher-value silicone, polyether-modified silicone, and specialized silicone-free technologies. Low-odor, low-VOC, mineral-oil-free, PFAS-free, and renewable-content formulations are becoming important product-development priorities for leading manufacturers.

The principal market challenge is achieving an effective balance among rapid foam knockdown, persistent foam suppression, and compatibility with the aqueous formulation. Excessive compatibility may weaken foam-control efficiency, while insufficient compatibility can cause cratering, fisheyes, deposition, gloss reduction, or other surface defects. New products therefore commonly require formulation screening, storage-stability evaluation, and production-line validation before commercial approval. Fluctuations in the prices of silicone fluids, polyethers, mineral oils, natural oils, emulsifiers, and hydrophobic silica may also pressure margins in standardized product categories. Future purchasing decisions will increasingly focus on cost in use, duration of performance, and technical support rather than nominal price per metric ton. Manufacturers with application laboratories, on-site testing capabilities, formulation expertise, and reliable regional supply networks will be better positioned to secure recurring demand in waterborne coatings, pulp and paper, water treatment, fermentation, and other high-value industrial formulations.

This report studies the global Water-based Antifoaming Agents production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Water-based Antifoaming Agents 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 Water-based Antifoaming Agents that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Water-based Antifoaming Agents total production and demand, 2021-2032, (Tons)

Global Water-based Antifoaming Agents total production value, 2021-2032, (USD Million)

Global Water-based Antifoaming Agents production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Water-based Antifoaming Agents consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Water-based Antifoaming Agents domestic production, consumption, key domestic manufacturers and share

Global Water-based Antifoaming Agents production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Water-based Antifoaming Agents production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Water-based Antifoaming Agents production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Water-based Antifoaming Agents 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 BASF SE, BYK-Chemie GmbH, Evonik Industries AG, Wacker Chemie AG, M?NZING CHEMIE GmbH, CHT Germany GmbH, Elkem ASA, Mare S.p.A., Dow Inc., Momentive Performance Materials Inc., 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 Water-based Antifoaming Agents 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 Water-based Antifoaming Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Water-based Antifoaming Agents Market, Segmentation by Type:

Silicone-Based Defoamers

Mineral Oil and Natural Oil-Based Defoamers

Polyether-Based Defoamers

Other Polymer-Based Defoamers

Global Water-based Antifoaming Agents Market, Segmentation by Chemical Base:

Silicone-Based Defoamers

Mineral Oil and Natural Oil-Based Defoamers

Polyether-Based Defoamers

Other Polymer-Based Defoamers

Global Water-based Antifoaming Agents Market, Segmentation by Silicone Content:

Silicone-Containing Defoamers

Silicone-Free Defoamers

Global Water-based Antifoaming Agents Market, Segmentation by Regulatory Grade:

General Industrial Grade

Food Contact and Food Processing Grade

Bioprocess and Pharmaceutical Grade

Global Water-based Antifoaming Agents Market, Segmentation by Application:

Paints, Coatings, Inks and Adhesives

Pulp and Paper

Water and Wastewater Treatment

Others

Companies Profiled:

BASF SE

BYK-Chemie GmbH

Evonik Industries AG

Wacker Chemie AG

M?NZING CHEMIE GmbH

CHT Germany GmbH

Elkem ASA

Mare S.p.A.

Dow Inc.

Momentive Performance Materials Inc.

Applied Material Solutions, Inc.

Crucible Chemical Company, Inc.

Shin-Etsu Chemical Co., Ltd.

ADEKA Corporation

Kao Corporation

San Nopco Korea Co., Ltd.

Rossari Biotech Limited

Resil Chemicals Pvt. Ltd.

Fineotex Chemical Limited

Jiangsu Sixin Technology Application Research Institute Co., Ltd.

Foshan Nanhai Datian Chemical Co., Ltd.

Hubei Longsheng Sihai New Materials Co., Ltd.

Zhejiang Transfar Chemicals Group Co., Ltd.

Marvel Chemical Co., Ltd.

Key Questions Answered:

1. How big is the global Water-based Antifoaming Agents market?
2. What is the demand of the global Water-based Antifoaming Agents market?
3. What is the year over year growth of the global Water-based Antifoaming Agents market?
4. What is the production and production value of the global Water-based Antifoaming Agents market?
5. Who are the key producers in the global Water-based Antifoaming Agents market?
6. What are the growth factors driving the market demand?

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