

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

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Abstracts

The global Water-based Defoamers 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 defoamers are functional additives used to prevent foam formation, eliminate existing foam, and release entrained microbubbles in waterborne formulations and aqueous industrial processes. They function by rapidly spreading across the gas-liquid interface, entering the foam film, accelerating liquid drainage, and destabilizing the bubble structure. Commercial products are generally supplied as emulsions, dispersions, concentrates, or powders and are commonly based on mineral oils, vegetable oils, polyethers, silicones, polyether-modified silicones, or organic polymers, frequently combined with hydrophobic silica, waxes, fatty-acid derivatives, emulsifiers, and stabilizers. Major applications include waterborne coatings, printing inks, adhesives, emulsion polymerization, pulp and paper, textile processing, water and wastewater treatment, industrial cleaning, metalworking fluids, construction materials, agrochemical formulations, fermentation, and food processing. Defoamers formulated exclusively for solventborne or oil-phase systems are excluded.

In 2025, global Water-based Defoamers production reached approximately 740,000 to 810,000 metric tons, while the weighted mainstream FOB price ranged from about USD 3,100 to USD 3,550 per metric ton. Conventional mineral-oil-based and polyether-based products were generally positioned at the lower end of the price range, whereas high-active silicone, polyether-modified silicone, food-grade, and fermentation-grade products typically commanded higher prices.

The global Water-based Defoamers market is being driven by the continuing transition toward aqueous formulations, tighter emission requirements, and the need to improve

industrial process efficiency. Coatings, printing inks, and adhesives are progressively shifting toward waterborne technologies, while pulp and paper, water treatment, textile processing, industrial cleaning, and biological fermentation increasingly require reliable foam control to improve equipment utilization, filling efficiency, filtration performance, production stability, and finished-product quality. As a result, defoamers are evolving from conventional process auxiliaries into performance-critical formulation components. Competitive differentiation is moving beyond rapid foam knockdown toward low dosage, persistent foam suppression, high-shear resistance, low odor, low volatile organic compound content, mineral-oil-free formulations, and products free from per- and polyfluoroalkyl substances. High-active concentrates, polyether-modified silicone products, bio-based formulations, and food-grade defoamers are therefore expected to capture a growing share of market value. Expansion of manufacturing capacity and application laboratories in Asia will also support stronger demand growth in China and other emerging economies.

The principal market constraints are formulation complexity, raw-material price volatility, differences in regional regulatory requirements, and strong price competition in standardized product grades. Defoaming efficiency must be balanced carefully against compatibility with the aqueous formulation. An excessively incompatible product may cause craters, fisheyes, gloss reduction, deposition, or recoating problems, whereas excessive compatibility can weaken foam knockdown and long-term suppression. Customers therefore generally require laboratory screening, storage and aging tests, and production-line validation before approving a new grade, creating relatively long qualification cycles. Changes in the cost and availability of silicone fluids, polyethers, mineral oils, vegetable oils, hydrophobic silica, and emulsification components can also affect supplier margins. Future purchasing decisions will increasingly focus on cost in use rather than price per metric ton. Suppliers capable of delivering long-term stability in complex aqueous systems, meeting food-contact and ecolabel requirements, and providing on-site testing and formulation support will be better positioned to secure recurring business in waterborne coatings, pulp and paper, water treatment, fermentation, and other high-value industrial formulations.

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

This report is a detailed and comprehensive analysis of the world market for Water-based Defoamers 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 Defoamers that

contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Water-based Defoamers 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 Defoamers 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 Defoamers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Water-based Defoamers Market, Segmentation by Type:

Formulation Defoamers

Process Antifoams

Global Water-based Defoamers 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 Defoamers Market, Segmentation by Silicone Content:

Silicone-Containing Defoamers

Silicone-Free Defoamers

Global Water-based Defoamers Market, Segmentation by Regulatory Grade:

General Industrial Grade

Food Contact and Food Processing Grade

Bioprocess and Pharmaceutical Grade

Global Water-based Defoamers 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 Defoamers market?

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Water-based Defoamers Production Value by Manufacturer (2021-2026)

- 3.2 World Water-based Defoamers Production by Manufacturer (2021-2026)
- 3.3 World Water-based Defoamers Average Price by Manufacturer (2021-2026)
- 3.4 Water-based Defoamers Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Water-based Defoamers Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Water-based Defoamers in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Water-based Defoamers in 2025
- 3.6 Water-based Defoamers Market: Overall Company Footprint Analysis
 - 3.6.1 Water-based Defoamers Market: Region Footprint
 - 3.6.2 Water-based Defoamers Market: Company Product Type Footprint
 - 3.6.3 Water-based Defoamers 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: Water-based Defoamers Production Value Comparison
 - 4.1.1 United States VS China: Water-based Defoamers Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Water-based Defoamers Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Water-based Defoamers Production Comparison
 - 4.2.1 United States VS China: Water-based Defoamers Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Water-based Defoamers Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Water-based Defoamers Consumption Comparison
 - 4.3.1 United States VS China: Water-based Defoamers Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Water-based Defoamers Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Water-based Defoamers Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Water-based Defoamers Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Water-based Defoamers Production Value (2021-2026)

4.4.3 United States Based Manufacturers Water-based Defoamers Production (2021-2026)

4.5 China Based Water-based Defoamers Manufacturers and Market Share

4.5.1 China Based Water-based Defoamers Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Water-based Defoamers Production Value (2021-2026)

4.5.3 China Based Manufacturers Water-based Defoamers Production (2021-2026)

4.6 Rest of World Based Water-based Defoamers Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Water-based Defoamers Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Water-based Defoamers Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Water-based Defoamers Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Water-based Defoamers Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Formulation Defoamers

5.2.2 Process Antifoams

5.3 Market Segment by Type

5.3.1 World Water-based Defoamers Production by Type (2021-2032)

5.3.2 World Water-based Defoamers Production Value by Type (2021-2032)

5.3.3 World Water-based Defoamers Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY CHEMICAL BASE

6.1 World Water-based Defoamers Market Size Overview by Chemical Base: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Chemical Base

6.2.1 Silicone-Based Defoamers

6.2.2 Mineral Oil and Natural Oil-Based Defoamers

6.2.3 Polyether-Based Defoamers

6.2.4 Other Polymer-Based Defoamers

6.3 Market Segment by Chemical Base

6.3.1 World Water-based Defoamers Production by Chemical Base (2021-2032)

6.3.2 World Water-based Defoamers Production Value by Chemical Base (2021-2032)

6.3.3 World Water-based Defoamers Average Price by Chemical Base (2021-2032)

7 MARKET ANALYSIS BY SILICONE CONTENT

7.1 World Water-based Defoamers Market Size Overview by Silicone Content: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Silicone Content

7.2.1 Silicone-Containing Defoamers

7.2.2 Silicone-Free Defoamers

7.3 Market Segment by Silicone Content

7.3.1 World Water-based Defoamers Production by Silicone Content (2021-2032)

7.3.2 World Water-based Defoamers Production Value by Silicone Content (2021-2032)

7.3.3 World Water-based Defoamers Average Price by Silicone Content (2021-2032)

8 MARKET ANALYSIS BY REGULATORY GRADE

8.1 World Water-based Defoamers Market Size Overview by Regulatory Grade: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Regulatory Grade

8.2.1 General Industrial Grade

8.2.2 Food Contact and Food Processing Grade

8.2.3 Bioprocess and Pharmaceutical Grade

8.3 Market Segment by Regulatory Grade

8.3.1 World Water-based Defoamers Production by Regulatory Grade (2021-2032)

8.3.2 World Water-based Defoamers Production Value by Regulatory Grade (2021-2032)

8.3.3 World Water-based Defoamers Average Price by Regulatory Grade (2021-2032)

9 MARKET ANALYSIS BY APPLICATION

9.1 World Water-based Defoamers Market Size Overview by Application: 2021 VS 2025 VS 2032

9.2 Segment Introduction by Application

9.2.1 Paints, Coatings, Inks and Adhesives

9.2.2 Pulp and Paper

9.2.3 Water and Wastewater Treatment

9.2.4 Others

9.3 Market Segment by Application

9.3.1 World Water-based Defoamers Production by Application (2021-2032)

9.3.2 World Water-based Defoamers Production Value by Application (2021-2032)

9.3.3 World Water-based Defoamers Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 BASF SE

10.1.1 BASF SE Details

10.1.2 BASF SE Major Business

10.1.3 BASF SE Water-based Defoamers Product and Services

10.1.4 BASF SE Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 BASF SE Recent Developments/Updates

10.1.6 BASF SE Competitive Strengths & Weaknesses

10.2 BYK-Chemie GmbH

10.2.1 BYK-Chemie GmbH Details

10.2.2 BYK-Chemie GmbH Major Business

10.2.3 BYK-Chemie GmbH Water-based Defoamers Product and Services

10.2.4 BYK-Chemie GmbH Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 BYK-Chemie GmbH Recent Developments/Updates

10.2.6 BYK-Chemie GmbH Competitive Strengths & Weaknesses

10.3 Evonik Industries AG

10.3.1 Evonik Industries AG Details

10.3.2 Evonik Industries AG Major Business

10.3.3 Evonik Industries AG Water-based Defoamers Product and Services

10.3.4 Evonik Industries AG Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Evonik Industries AG Recent Developments/Updates

10.3.6 Evonik Industries AG Competitive Strengths & Weaknesses

10.4 Wacker Chemie AG

10.4.1 Wacker Chemie AG Details

10.4.2 Wacker Chemie AG Major Business

10.4.3 Wacker Chemie AG Water-based Defoamers Product and Services

10.4.4 Wacker Chemie AG Water-based Defoamers Production, Price, Value, Gross

Margin and Market Share (2021-2026)

10.4.5 Wacker Chemie AG Recent Developments/Updates

10.4.6 Wacker Chemie AG Competitive Strengths & Weaknesses

10.5 M?NZING CHEMIE GmbH

10.5.1 M?NZING CHEMIE GmbH Details

10.5.2 M?NZING CHEMIE GmbH Major Business

10.5.3 M?NZING CHEMIE GmbH Water-based Defoamers Product and Services

10.5.4 M?NZING CHEMIE GmbH Water-based Defoamers Production, Price, Value,

Gross Margin and Market Share (2021-2026)

10.5.5 M?NZING CHEMIE GmbH Recent Developments/Updates

10.5.6 M?NZING CHEMIE GmbH Competitive Strengths & Weaknesses

10.6 CHT Germany GmbH

10.6.1 CHT Germany GmbH Details

10.6.2 CHT Germany GmbH Major Business

10.6.3 CHT Germany GmbH Water-based Defoamers Product and Services

10.6.4 CHT Germany GmbH Water-based Defoamers Production, Price, Value, Gross

Margin and Market Share (2021-2026)

10.6.5 CHT Germany GmbH Recent Developments/Updates

10.6.6 CHT Germany GmbH Competitive Strengths & Weaknesses

10.7 Elkem ASA

10.7.1 Elkem ASA Details

10.7.2 Elkem ASA Major Business

10.7.3 Elkem ASA Water-based Defoamers Product and Services

10.7.4 Elkem ASA Water-based Defoamers Production, Price, Value, Gross Margin

and Market Share (2021-2026)

10.7.5 Elkem ASA Recent Developments/Updates

10.7.6 Elkem ASA Competitive Strengths & Weaknesses

10.8 Mare S.p.A.

10.8.1 Mare S.p.A. Details

10.8.2 Mare S.p.A. Major Business

10.8.3 Mare S.p.A. Water-based Defoamers Product and Services

10.8.4 Mare S.p.A. Water-based Defoamers Production, Price, Value, Gross Margin

and Market Share (2021-2026)

10.8.5 Mare S.p.A. Recent Developments/Updates

10.8.6 Mare S.p.A. Competitive Strengths & Weaknesses

10.9 Dow Inc.

10.9.1 Dow Inc. Details

10.9.2 Dow Inc. Major Business

10.9.3 Dow Inc. Water-based Defoamers Product and Services

10.9.4 Dow Inc. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.9.5 Dow Inc. Recent Developments/Updates

10.9.6 Dow Inc. Competitive Strengths & Weaknesses

10.10 Momentive Performance Materials Inc.

10.10.1 Momentive Performance Materials Inc. Details

10.10.2 Momentive Performance Materials Inc. Major Business

10.10.3 Momentive Performance Materials Inc. Water-based Defoamers Product and Services

10.10.4 Momentive Performance Materials Inc. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.10.5 Momentive Performance Materials Inc. Recent Developments/Updates

10.10.6 Momentive Performance Materials Inc. Competitive Strengths & Weaknesses

10.11 Applied Material Solutions, Inc.

10.11.1 Applied Material Solutions, Inc. Details

10.11.2 Applied Material Solutions, Inc. Major Business

10.11.3 Applied Material Solutions, Inc. Water-based Defoamers Product and Services

10.11.4 Applied Material Solutions, Inc. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.11.5 Applied Material Solutions, Inc. Recent Developments/Updates

10.11.6 Applied Material Solutions, Inc. Competitive Strengths & Weaknesses

10.12 Crucible Chemical Company, Inc.

10.12.1 Crucible Chemical Company, Inc. Details

10.12.2 Crucible Chemical Company, Inc. Major Business

10.12.3 Crucible Chemical Company, Inc. Water-based Defoamers Product and Services

10.12.4 Crucible Chemical Company, Inc. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 Crucible Chemical Company, Inc. Recent Developments/Updates

10.12.6 Crucible Chemical Company, Inc. Competitive Strengths & Weaknesses

10.13 Shin-Etsu Chemical Co., Ltd.

10.13.1 Shin-Etsu Chemical Co., Ltd. Details

10.13.2 Shin-Etsu Chemical Co., Ltd. Major Business

10.13.3 Shin-Etsu Chemical Co., Ltd. Water-based Defoamers Product and Services

10.13.4 Shin-Etsu Chemical Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.13.5 Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

10.13.6 Shin-Etsu Chemical Co., Ltd. Competitive Strengths & Weaknesses

10.14 ADEKA Corporation

- 10.14.1 ADEKA Corporation Details
- 10.14.2 ADEKA Corporation Major Business
- 10.14.3 ADEKA Corporation Water-based Defoamers Product and Services
- 10.14.4 ADEKA Corporation Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.14.5 ADEKA Corporation Recent Developments/Updates
- 10.14.6 ADEKA Corporation Competitive Strengths & Weaknesses
- 10.15 Kao Corporation
 - 10.15.1 Kao Corporation Details
 - 10.15.2 Kao Corporation Major Business
 - 10.15.3 Kao Corporation Water-based Defoamers Product and Services
 - 10.15.4 Kao Corporation Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.15.5 Kao Corporation Recent Developments/Updates
 - 10.15.6 Kao Corporation Competitive Strengths & Weaknesses
- 10.16 San Nopco Korea Co., Ltd.
 - 10.16.1 San Nopco Korea Co., Ltd. Details
 - 10.16.2 San Nopco Korea Co., Ltd. Major Business
 - 10.16.3 San Nopco Korea Co., Ltd. Water-based Defoamers Product and Services
 - 10.16.4 San Nopco Korea Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.16.5 San Nopco Korea Co., Ltd. Recent Developments/Updates
 - 10.16.6 San Nopco Korea Co., Ltd. Competitive Strengths & Weaknesses
- 10.17 Rossari Biotech Limited
 - 10.17.1 Rossari Biotech Limited Details
 - 10.17.2 Rossari Biotech Limited Major Business
 - 10.17.3 Rossari Biotech Limited Water-based Defoamers Product and Services
 - 10.17.4 Rossari Biotech Limited Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.17.5 Rossari Biotech Limited Recent Developments/Updates
 - 10.17.6 Rossari Biotech Limited Competitive Strengths & Weaknesses
- 10.18 Resil Chemicals Pvt. Ltd.
 - 10.18.1 Resil Chemicals Pvt. Ltd. Details
 - 10.18.2 Resil Chemicals Pvt. Ltd. Major Business
 - 10.18.3 Resil Chemicals Pvt. Ltd. Water-based Defoamers Product and Services
 - 10.18.4 Resil Chemicals Pvt. Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 10.18.5 Resil Chemicals Pvt. Ltd. Recent Developments/Updates
 - 10.18.6 Resil Chemicals Pvt. Ltd. Competitive Strengths & Weaknesses

10.19 Fineotex Chemical Limited

10.19.1 Fineotex Chemical Limited Details

10.19.2 Fineotex Chemical Limited Major Business

10.19.3 Fineotex Chemical Limited Water-based Defoamers Product and Services

10.19.4 Fineotex Chemical Limited Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.19.5 Fineotex Chemical Limited Recent Developments/Updates

10.19.6 Fineotex Chemical Limited Competitive Strengths & Weaknesses

10.20 Jiangsu Sixin Technology Application Research Institute Co., Ltd.

10.20.1 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Details

10.20.2 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Major Business

10.20.3 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Water-based Defoamers Product and Services

10.20.4 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.20.5 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Recent Developments/Updates

10.20.6 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Competitive Strengths & Weaknesses

10.21 Foshan Nanhai Datian Chemical Co., Ltd.

10.21.1 Foshan Nanhai Datian Chemical Co., Ltd. Details

10.21.2 Foshan Nanhai Datian Chemical Co., Ltd. Major Business

10.21.3 Foshan Nanhai Datian Chemical Co., Ltd. Water-based Defoamers Product and Services

10.21.4 Foshan Nanhai Datian Chemical Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.21.5 Foshan Nanhai Datian Chemical Co., Ltd. Recent Developments/Updates

10.21.6 Foshan Nanhai Datian Chemical Co., Ltd. Competitive Strengths & Weaknesses

10.22 Hubei Longsheng Sihai New Materials Co., Ltd.

10.22.1 Hubei Longsheng Sihai New Materials Co., Ltd. Details

10.22.2 Hubei Longsheng Sihai New Materials Co., Ltd. Major Business

10.22.3 Hubei Longsheng Sihai New Materials Co., Ltd. Water-based Defoamers Product and Services

10.22.4 Hubei Longsheng Sihai New Materials Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.22.5 Hubei Longsheng Sihai New Materials Co., Ltd. Recent

Developments/Updates

10.22.6 Hubei Longsheng Sihai New Materials Co., Ltd. Competitive Strengths & Weaknesses

10.23 Zhejiang Transfar Chemicals Group Co., Ltd.

10.23.1 Zhejiang Transfar Chemicals Group Co., Ltd. Details

10.23.2 Zhejiang Transfar Chemicals Group Co., Ltd. Major Business

10.23.3 Zhejiang Transfar Chemicals Group Co., Ltd. Water-based Defoamers Product and Services

10.23.4 Zhejiang Transfar Chemicals Group Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.23.5 Zhejiang Transfar Chemicals Group Co., Ltd. Recent Developments/Updates

10.23.6 Zhejiang Transfar Chemicals Group Co., Ltd. Competitive Strengths & Weaknesses

10.24 Marvel Chemical Co., Ltd.

10.24.1 Marvel Chemical Co., Ltd. Details

10.24.2 Marvel Chemical Co., Ltd. Major Business

10.24.3 Marvel Chemical Co., Ltd. Water-based Defoamers Product and Services

10.24.4 Marvel Chemical Co., Ltd. Water-based Defoamers Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.24.5 Marvel Chemical Co., Ltd. Recent Developments/Updates

10.24.6 Marvel Chemical Co., Ltd. Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Water-based Defoamers Industry Chain

11.2 Water-based Defoamers Upstream Analysis

11.2.1 Water-based Defoamers Core Raw Materials

11.2.2 Main Manufacturers of Water-based Defoamers Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 Water-based Defoamers Production Mode

11.6 Water-based Defoamers Procurement Model

11.7 Water-based Defoamers Industry Sales Model and Sales Channels

11.7.1 Water-based Defoamers Sales Model

11.7.2 Water-based Defoamers 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 Water-based Defoamers Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Water-based Defoamers Production Value by Region (2021-2026) & (USD Million)

Table 3. World Water-based Defoamers Production Value by Region (2027-2032) & (USD Million)

Table 4. World Water-based Defoamers Production Value Market Share by Region (2021-2026)

Table 5. World Water-based Defoamers Production Value Market Share by Region (2027-2032)

Table 6. World Water-based Defoamers Production by Region (2021-2026) & (Tons)

Table 7. World Water-based Defoamers Production by Region (2027-2032) & (Tons)

Table 8. World Water-based Defoamers Production Market Share by Region (2021-2026)

Table 9. World Water-based Defoamers Production Market Share by Region (2027-2032)

Table 10. World Water-based Defoamers Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Water-based Defoamers Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Water-based Defoamers Major Market Trends

Table 13. World Water-based Defoamers Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Water-based Defoamers Consumption by Region (2021-2026) & (Tons)

Table 15. World Water-based Defoamers Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Water-based Defoamers Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Water-based Defoamers Producers in 2025

Table 18. World Water-based Defoamers Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Water-based Defoamers Producers in 2025

Table 20. World Water-based Defoamers Average Price by Manufacturer (2021-2026) &

(US\$/Ton)

Table 21. Global Water-based Defoamers Company Evaluation Quadrant

Table 22. World Water-based Defoamers Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Water-based Defoamers Production Site of Key Manufacturer

Table 24. Water-based Defoamers Market: Company Product Type Footprint

Table 25. Water-based Defoamers Market: Company Product Application Footprint

Table 26. Water-based Defoamers Competitive Factors

Table 27. Water-based Defoamers New Entrant and Capacity Expansion Plans

Table 28. Water-based Defoamers Mergers & Acquisitions Activity

Table 29. United States VS China Water-based Defoamers Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Water-based Defoamers Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Water-based Defoamers Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Water-based Defoamers Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Water-based Defoamers Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Water-based Defoamers Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Water-based Defoamers Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Water-based Defoamers Production Market Share (2021-2026)

Table 37. China Based Water-based Defoamers Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Water-based Defoamers Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Water-based Defoamers Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Water-based Defoamers Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Water-based Defoamers Production Market Share (2021-2026)

Table 42. Rest of World Based Water-based Defoamers Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Water-based Defoamers Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Water-based Defoamers Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Water-based Defoamers Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Water-based Defoamers Production Market Share (2021-2026)

Table 47. World Water-based Defoamers Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Water-based Defoamers Production by Type (2021-2026) & (Tons)

Table 49. World Water-based Defoamers Production by Type (2027-2032) & (Tons)

Table 50. World Water-based Defoamers Production Value by Type (2021-2026) & (USD Million)

Table 51. World Water-based Defoamers Production Value by Type (2027-2032) & (USD Million)

Table 52. World Water-based Defoamers Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Water-based Defoamers Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Water-based Defoamers Production Value by Chemical Base, (USD Million), 2021 & 2025 & 2032

Table 55. World Water-based Defoamers Production by Chemical Base (2021-2026) & (Tons)

Table 56. World Water-based Defoamers Production by Chemical Base (2027-2032) & (Tons)

Table 57. World Water-based Defoamers Production Value by Chemical Base (2021-2026) & (USD Million)

Table 58. World Water-based Defoamers Production Value by Chemical Base (2027-2032) & (USD Million)

Table 59. World Water-based Defoamers Average Price by Chemical Base (2021-2026) & (US\$/Ton)

Table 60. World Water-based Defoamers Average Price by Chemical Base (2027-2032) & (US\$/Ton)

Table 61. World Water-based Defoamers Production Value by Silicone Content, (USD Million), 2021 & 2025 & 2032

Table 62. World Water-based Defoamers Production by Silicone Content (2021-2026) & (Tons)

Table 63. World Water-based Defoamers Production by Silicone Content (2027-2032) &

(Tons)

Table 64. World Water-based Defoamers Production Value by Silicone Content (2021-2026) & (USD Million)

Table 65. World Water-based Defoamers Production Value by Silicone Content (2027-2032) & (USD Million)

Table 66. World Water-based Defoamers Average Price by Silicone Content (2021-2026) & (US\$/Ton)

Table 67. World Water-based Defoamers Average Price by Silicone Content (2027-2032) & (US\$/Ton)

Table 68. World Water-based Defoamers Production Value by Regulatory Grade, (USD Million), 2021 & 2025 & 2032

Table 69. World Water-based Defoamers Production by Regulatory Grade (2021-2026) & (Tons)

Table 70. World Water-based Defoamers Production by Regulatory Grade (2027-2032) & (Tons)

Table 71. World Water-based Defoamers Production Value by Regulatory Grade (2021-2026) & (USD Million)

Table 72. World Water-based Defoamers Production Value by Regulatory Grade (2027-2032) & (USD Million)

Table 73. World Water-based Defoamers Average Price by Regulatory Grade (2021-2026) & (US\$/Ton)

Table 74. World Water-based Defoamers Average Price by Regulatory Grade (2027-2032) & (US\$/Ton)

Table 75. World Water-based Defoamers Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Water-based Defoamers Production by Application (2021-2026) & (Tons)

Table 77. World Water-based Defoamers Production by Application (2027-2032) & (Tons)

Table 78. World Water-based Defoamers Production Value by Application (2021-2026) & (USD Million)

Table 79. World Water-based Defoamers Production Value by Application (2027-2032) & (USD Million)

Table 80. World Water-based Defoamers Average Price by Application (2021-2026) & (US\$/Ton)

Table 81. World Water-based Defoamers Average Price by Application (2027-2032) & (US\$/Ton)

Table 82. BASF SE Basic Information, Manufacturing Base and Competitors

Table 83. BASF SE Major Business

Table 84. BASF SE Water-based Defoamers Product and Services
Table 85. BASF SE Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 86. BASF SE Recent Developments/Updates
Table 87. BASF SE Competitive Strengths & Weaknesses
Table 88. BYK-Chemie GmbH Basic Information, Manufacturing Base and Competitors
Table 89. BYK-Chemie GmbH Major Business
Table 90. BYK-Chemie GmbH Water-based Defoamers Product and Services
Table 91. BYK-Chemie GmbH Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 92. BYK-Chemie GmbH Recent Developments/Updates
Table 93. BYK-Chemie GmbH Competitive Strengths & Weaknesses
Table 94. Evonik Industries AG Basic Information, Manufacturing Base and Competitors
Table 95. Evonik Industries AG Major Business
Table 96. Evonik Industries AG Water-based Defoamers Product and Services
Table 97. Evonik Industries AG Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 98. Evonik Industries AG Recent Developments/Updates
Table 99. Evonik Industries AG Competitive Strengths & Weaknesses
Table 100. Wacker Chemie AG Basic Information, Manufacturing Base and Competitors
Table 101. Wacker Chemie AG Major Business
Table 102. Wacker Chemie AG Water-based Defoamers Product and Services
Table 103. Wacker Chemie AG Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 104. Wacker Chemie AG Recent Developments/Updates
Table 105. Wacker Chemie AG Competitive Strengths & Weaknesses
Table 106. M?NZING CHEMIE GmbH Basic Information, Manufacturing Base and Competitors
Table 107. M?NZING CHEMIE GmbH Major Business
Table 108. M?NZING CHEMIE GmbH Water-based Defoamers Product and Services
Table 109. M?NZING CHEMIE GmbH Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 110. M?NZING CHEMIE GmbH Recent Developments/Updates
Table 111. M?NZING CHEMIE GmbH Competitive Strengths & Weaknesses
Table 112. CHT Germany GmbH Basic Information, Manufacturing Base and

Competitors

Table 113. CHT Germany GmbH Major Business

Table 114. CHT Germany GmbH Water-based Defoamers Product and Services

Table 115. CHT Germany GmbH Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. CHT Germany GmbH Recent Developments/Updates

Table 117. CHT Germany GmbH Competitive Strengths & Weaknesses

Table 118. Elkem ASA Basic Information, Manufacturing Base and Competitors

Table 119. Elkem ASA Major Business

Table 120. Elkem ASA Water-based Defoamers Product and Services

Table 121. Elkem ASA Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. Elkem ASA Recent Developments/Updates

Table 123. Elkem ASA Competitive Strengths & Weaknesses

Table 124. Mare S.p.A. Basic Information, Manufacturing Base and Competitors

Table 125. Mare S.p.A. Major Business

Table 126. Mare S.p.A. Water-based Defoamers Product and Services

Table 127. Mare S.p.A. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Mare S.p.A. Recent Developments/Updates

Table 129. Mare S.p.A. Competitive Strengths & Weaknesses

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

Table 131. Dow Inc. Major Business

Table 132. Dow Inc. Water-based Defoamers Product and Services

Table 133. Dow Inc. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Dow Inc. Recent Developments/Updates

Table 135. Dow Inc. Competitive Strengths & Weaknesses

Table 136. Momentive Performance Materials Inc. Basic Information, Manufacturing Base and Competitors

Table 137. Momentive Performance Materials Inc. Major Business

Table 138. Momentive Performance Materials Inc. Water-based Defoamers Product and Services

Table 139. Momentive Performance Materials Inc. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Momentive Performance Materials Inc. Recent Developments/Updates

Table 141. Momentive Performance Materials Inc. Competitive Strengths &

Weaknesses

Table 142. Applied Material Solutions, Inc. Basic Information, Manufacturing Base and Competitors

Table 143. Applied Material Solutions, Inc. Major Business

Table 144. Applied Material Solutions, Inc. Water-based Defoamers Product and Services

Table 145. Applied Material Solutions, Inc. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Applied Material Solutions, Inc. Recent Developments/Updates

Table 147. Applied Material Solutions, Inc. Competitive Strengths & Weaknesses

Table 148. Crucible Chemical Company, Inc. Basic Information, Manufacturing Base and Competitors

Table 149. Crucible Chemical Company, Inc. Major Business

Table 150. Crucible Chemical Company, Inc. Water-based Defoamers Product and Services

Table 151. Crucible Chemical Company, Inc. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Crucible Chemical Company, Inc. Recent Developments/Updates

Table 153. Crucible Chemical Company, Inc. Competitive Strengths & Weaknesses

Table 154. Shin-Etsu Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 155. Shin-Etsu Chemical Co., Ltd. Major Business

Table 156. Shin-Etsu Chemical Co., Ltd. Water-based Defoamers Product and Services

Table 157. Shin-Etsu Chemical Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Shin-Etsu Chemical Co., Ltd. Recent Developments/Updates

Table 159. Shin-Etsu Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 160. ADEKA Corporation Basic Information, Manufacturing Base and Competitors

Table 161. ADEKA Corporation Major Business

Table 162. ADEKA Corporation Water-based Defoamers Product and Services

Table 163. ADEKA Corporation Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. ADEKA Corporation Recent Developments/Updates

Table 165. ADEKA Corporation Competitive Strengths & Weaknesses

Table 166. Kao Corporation Basic Information, Manufacturing Base and Competitors

Table 167. Kao Corporation Major Business

Table 168. Kao Corporation Water-based Defoamers Product and Services

Table 169. Kao Corporation Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Kao Corporation Recent Developments/Updates

Table 171. Kao Corporation Competitive Strengths & Weaknesses

Table 172. San Nopco Korea Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 173. San Nopco Korea Co., Ltd. Major Business

Table 174. San Nopco Korea Co., Ltd. Water-based Defoamers Product and Services

Table 175. San Nopco Korea Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. San Nopco Korea Co., Ltd. Recent Developments/Updates

Table 177. San Nopco Korea Co., Ltd. Competitive Strengths & Weaknesses

Table 178. Rossari Biotech Limited Basic Information, Manufacturing Base and Competitors

Table 179. Rossari Biotech Limited Major Business

Table 180. Rossari Biotech Limited Water-based Defoamers Product and Services

Table 181. Rossari Biotech Limited Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 182. Rossari Biotech Limited Recent Developments/Updates

Table 183. Rossari Biotech Limited Competitive Strengths & Weaknesses

Table 184. Resil Chemicals Pvt. Ltd. Basic Information, Manufacturing Base and Competitors

Table 185. Resil Chemicals Pvt. Ltd. Major Business

Table 186. Resil Chemicals Pvt. Ltd. Water-based Defoamers Product and Services

Table 187. Resil Chemicals Pvt. Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 188. Resil Chemicals Pvt. Ltd. Recent Developments/Updates

Table 189. Resil Chemicals Pvt. Ltd. Competitive Strengths & Weaknesses

Table 190. Fineotex Chemical Limited Basic Information, Manufacturing Base and Competitors

Table 191. Fineotex Chemical Limited Major Business

Table 192. Fineotex Chemical Limited Water-based Defoamers Product and Services

Table 193. Fineotex Chemical Limited Water-based Defoamers Production (Tons),

Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 194. Fineotex Chemical Limited Recent Developments/Updates

Table 195. Fineotex Chemical Limited Competitive Strengths & Weaknesses

Table 196. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 197. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Major Business

Table 198. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Water-based Defoamers Product and Services

Table 199. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 200. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Recent Developments/Updates

Table 201. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Competitive Strengths & Weaknesses

Table 202. Foshan Nanhai Datian Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 203. Foshan Nanhai Datian Chemical Co., Ltd. Major Business

Table 204. Foshan Nanhai Datian Chemical Co., Ltd. Water-based Defoamers Product and Services

Table 205. Foshan Nanhai Datian Chemical Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 206. Foshan Nanhai Datian Chemical Co., Ltd. Recent Developments/Updates

Table 207. Foshan Nanhai Datian Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 208. Hubei Longsheng Sihai New Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 209. Hubei Longsheng Sihai New Materials Co., Ltd. Major Business

Table 210. Hubei Longsheng Sihai New Materials Co., Ltd. Water-based Defoamers Product and Services

Table 211. Hubei Longsheng Sihai New Materials Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 212. Hubei Longsheng Sihai New Materials Co., Ltd. Recent Developments/Updates

Table 213. Hubei Longsheng Sihai New Materials Co., Ltd. Competitive Strengths &

Weaknesses

Table 214. Zhejiang Transfar Chemicals Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 215. Zhejiang Transfar Chemicals Group Co., Ltd. Major Business

Table 216. Zhejiang Transfar Chemicals Group Co., Ltd. Water-based Defoamers Product and Services

Table 217. Zhejiang Transfar Chemicals Group Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 218. Zhejiang Transfar Chemicals Group Co., Ltd. Recent Developments/Updates

Table 219. Zhejiang Transfar Chemicals Group Co., Ltd. Competitive Strengths & Weaknesses

Table 220. Marvel Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 221. Marvel Chemical Co., Ltd. Major Business

Table 222. Marvel Chemical Co., Ltd. Water-based Defoamers Product and Services

Table 223. Marvel Chemical Co., Ltd. Water-based Defoamers Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 224. Marvel Chemical Co., Ltd. Recent Developments/Updates

Table 225. Marvel Chemical Co., Ltd. Competitive Strengths & Weaknesses

Table 226. Global Key Players of Water-based Defoamers Upstream (Raw Materials)

Table 227. Global Water-based Defoamers Typical Customers

Table 228. Water-based Defoamers Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Water-based Defoamers Picture

Figure 2. World Water-based Defoamers Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Water-based Defoamers Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Water-based Defoamers Production (2021-2032) & (Tons)

Figure 5. World Water-based Defoamers Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Water-based Defoamers Production Value Market Share by Region (2021-2032)

Figure 7. World Water-based Defoamers Production Market Share by Region (2021-2032)

Figure 8. North America Water-based Defoamers Production (2021-2032) & (Tons)

Figure 9. Europe Water-based Defoamers Production (2021-2032) & (Tons)

Figure 10. China Water-based Defoamers Production (2021-2032) & (Tons)

Figure 11. Japan Water-based Defoamers Production (2021-2032) & (Tons)

Figure 12. Water-based Defoamers Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 15. World Water-based Defoamers Consumption Market Share by Region (2021-2032)

Figure 16. United States Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 17. China Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 18. Europe Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 19. Japan Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 20. South Korea Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 22. India Water-based Defoamers Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Water-based Defoamers by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Water-based Defoamers Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Water-based Defoamers Markets in 2025

Figure 26. United States VS China: Water-based Defoamers Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Water-based Defoamers Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Water-based Defoamers Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Water-based Defoamers Production Market Share 2025

Figure 30. China Based Manufacturers Water-based Defoamers Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Water-based Defoamers Production Market Share 2025

Figure 32. World Water-based Defoamers Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Water-based Defoamers Production Value Market Share by Type in 2025

Figure 34. Formulation Defoamers

Figure 35. Process Antifoams

Figure 36. World Water-based Defoamers Production Market Share by Type (2021-2032)

Figure 37. World Water-based Defoamers Production Value Market Share by Type (2021-2032)

Figure 38. World Water-based Defoamers Average Price by Type (2021-2032) & (US\$/Ton)

Figure 39. World Water-based Defoamers Production Value by Chemical Base, (USD Million), 2021 & 2025 & 2032

Figure 40. World Water-based Defoamers Production Value Market Share by Chemical Base in 2025

Figure 41. Silicone-Based Defoamers

Figure 42. Mineral Oil and Natural Oil-Based Defoamers

Figure 43. Polyether-Based Defoamers

Figure 44. Other Polymer-Based Defoamers

Figure 45. World Water-based Defoamers Production Market Share by Chemical Base (2021-2032)

Figure 46. World Water-based Defoamers Production Value Market Share by Chemical Base (2021-2032)

Figure 47. World Water-based Defoamers Average Price by Chemical Base (2021-2032) & (US\$/Ton)

Figure 48. World Water-based Defoamers Production Value by Silicone Content, (USD Million), 2021 & 2025 & 2032

Figure 49. World Water-based Defoamers Production Value Market Share by Silicone

Content in 2025

Figure 50. Silicone-Containing Defoamers

Figure 51. Silicone-Free Defoamers

Figure 52. World Water-based Defoamers Production Market Share by Silicone Content (2021-2032)

Figure 53. World Water-based Defoamers Production Value Market Share by Silicone Content (2021-2032)

Figure 54. World Water-based Defoamers Average Price by Silicone Content (2021-2032) & (US\$/Ton)

Figure 55. World Water-based Defoamers Production Value by Regulatory Grade, (USD Million), 2021 & 2025 & 2032

Figure 56. World Water-based Defoamers Production Value Market Share by Regulatory Grade in 2025

Figure 57. General Industrial Grade

Figure 58. Food Contact and Food Processing Grade

Figure 59. Bioprocess and Pharmaceutical Grade

Figure 60. World Water-based Defoamers Production Market Share by Regulatory Grade (2021-2032)

Figure 61. World Water-based Defoamers Production Value Market Share by Regulatory Grade (2021-2032)

Figure 62. World Water-based Defoamers Average Price by Regulatory Grade (2021-2032) & (US\$/Ton)

Figure 63. World Water-based Defoamers Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 64. World Water-based Defoamers Production Value Market Share by Application in 2025

Figure 65. Paints, Coatings, Inks and Adhesives

Figure 66. Pulp and Paper

Figure 67. Water and Wastewater Treatment

Figure 68. Others

Figure 69. World Water-based Defoamers Production Market Share by Application (2021-2032)

Figure 70. World Water-based Defoamers Production Value Market Share by Application (2021-2032)

Figure 71. World Water-based Defoamers Average Price by Application (2021-2032) & (US\$/Ton)

Figure 72. Water-based Defoamers Industry Chain

Figure 73. Water-based Defoamers Procurement Model

Figure 74. Water-based Defoamers Sales Model

Figure 75. Water-based Defoamers Sales Channels, Direct Sales, and Distribution

Figure 76. Methodology

Figure 77. Research Process and Data Source

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