

# Global Waterborne Anti-foaming Agents Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G08B4033C8D8EN.html>

Date: August 2026

Pages: 167

Price: US\$ 4,480.00 (Single User License)

ID: G08B4033C8D8EN

## Abstracts

The global Waterborne Anti-foaming 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).

Waterborne Anti-foaming Agents are functional additives used in waterborne formulations and aqueous industrial processes to prevent foam formation, collapse existing foam, delay foam recurrence, and maintain sustained low-foam operating conditions. They function by reducing foam-film stability, penetrating or disrupting the bubble lamella, accelerating liquid drainage, and limiting 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, oil-based liquids, anhydrous concentrates, high-active compounds, or free-flowing powders. The product scope is defined by the aqueous system in which the additive is used rather than exclusively by the carrier of the additive itself. Consequently, 100% active silicone compounds, non-aqueous liquid concentrates, and dispersible powders intended for aqueous systems are included.

Waterborne Anti-foaming Agents are widely used in waterborne coatings, printing inks, adhesives, emulsion polymerization, pulp and paper, water and wastewater treatment, textile processing, industrial cleaning, metalworking fluids, construction chemicals, agrochemical formulations, food processing, and biological fermentation. They reduce the effects of vessel overflow, entrained air, residual microfoam, and foam recurrence on equipment utilization, production throughput, filtration performance, and finished-product appearance. Products formulated exclusively for solventborne, anhydrous oil-phase, or other non-aqueous systems are excluded.

In 2025, global Waterborne Anti-foaming Agents 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. General-purpose mineral-oil-based, natural-oil-based, and selected polyether products were primarily positioned at the lower end of the range, whereas high-active silicone, polyether-modified silicone, food-grade, fermentation-grade, and high-temperature-resistant products generally commanded higher unit prices.

The global Waterborne Anti-foaming Agents market is being supported by the increasing penetration of waterborne formulations, the adoption of continuous industrial processes, and tighter environmental compliance requirements. Coatings, printing inks, adhesives, and polymer emulsions are continuing to shift toward low-VOC and waterborne technologies, increasing the need for effective foam control during high-speed dispersion, grinding, pumping, filling, storage, and application. In pulp and paper, water treatment, textile processing, industrial cleaning, and metalworking, manufacturers are placing greater emphasis on usable vessel capacity, filtration speed, circulation stability, and total production cost. Waterborne antifoaming agents are therefore evolving from basic auxiliary chemicals into process-critical additives that protect production stability and finished-product quality. Food processing, biological fermentation, and agrochemical formulations are also generating stronger demand for low-dose, food-contact-compliant, temperature-resistant, and persistent foam-control 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 central product-development priorities for leading suppliers.

The primary market challenge is achieving an effective balance among rapid foam knockdown, persistent suppression, and compatibility with the aqueous medium. Excessive compatibility may reduce foam-control efficiency, while insufficient compatibility can cause cratering, fisheyes, deposition, gloss loss, or other surface defects. New products consequently require laboratory screening, storage-stability evaluation, and production-line validation before commercial approval. Fluctuations in silicone fluids, polyethers, mineral oils, natural oils, emulsifiers, and hydrophobic silica may also pressure margins in standardized product categories. Demand is expected to shift further toward Asia as regional manufacturing, water-treatment infrastructure, and advanced waterborne formulation industries expand. European and North American suppliers, however, are likely to retain strong positions in high-performance, regulatory-compliant, and customized products. Purchasing decisions will increasingly be based on

cost in use, duration of performance, and technical support rather than nominal price per metric ton. Manufacturers with local application laboratories, formulation expertise, and reliable regional supply capabilities will be better positioned to secure recurring demand.

This report studies the global Waterborne Anti-foaming Agents production, demand, key manufacturers, and key regions.

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

#### Highlights and key features of the study

Global Waterborne Anti-foaming Agents total production and demand, 2021-2032, (Tons)

Global Waterborne Anti-foaming Agents total production value, 2021-2032, (USD Million)

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

Global Waterborne Anti-foaming Agents consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Waterborne Anti-foaming Agents domestic production, consumption, key domestic manufacturers and share

Global Waterborne Anti-foaming Agents production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Waterborne Anti-foaming Agents production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Waterborne Anti-foaming Agents production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Waterborne Anti-foaming 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 Waterborne Anti-foaming 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 Waterborne Anti-foaming Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Waterborne Anti-foaming Agents Market, Segmentation by Type:

Formulation Defoamers

Process Antifoams

### Global Waterborne Anti-foaming Agents Market, Segmentation by Chemical Base:

Silicone-Based Defoamers

Mineral Oil and Natural Oil-Based Defoamers

Polyether-Based Defoamers

Other Polymer-Based Defoamers

### Global Waterborne Anti-foaming Agents Market, Segmentation by Silicone Content:

Silicone-Containing Defoamers

Silicone-Free Defoamers

### Global Waterborne Anti-foaming Agents Market, Segmentation by Regulatory Grade:

General Industrial Grade

Food Contact and Food Processing Grade

Bioprocess and Pharmaceutical Grade

### Global Waterborne Anti-foaming 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 Waterborne Anti-foaming Agents market?
2. What is the demand of the global Waterborne Anti-foaming Agents market?
3. What is the year over year growth of the global Waterborne Anti-foaming Agents market?
4. What is the production and production value of the global Waterborne Anti-foaming Agents market?
5. Who are the key producers in the global Waterborne Anti-foaming Agents market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

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

### 2 DEMAND SUMMARY

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

### 3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

## Share Comparison (2021 & 2025 & 2032)

### 4.4 United States Based Waterborne Anti-foaming Agents Manufacturers and Market Share, 2021-2026

#### 4.4.1 United States Based Waterborne Anti-foaming Agents Manufacturers, Headquarters and Production Site (States, Country)

#### 4.4.2 United States Based Manufacturers Waterborne Anti-foaming Agents Production Value (2021-2026)

#### 4.4.3 United States Based Manufacturers Waterborne Anti-foaming Agents Production (2021-2026)

### 4.5 China Based Waterborne Anti-foaming Agents Manufacturers and Market Share

#### 4.5.1 China Based Waterborne Anti-foaming Agents Manufacturers, Headquarters and Production Site (Province, Country)

#### 4.5.2 China Based Manufacturers Waterborne Anti-foaming Agents Production Value (2021-2026)

#### 4.5.3 China Based Manufacturers Waterborne Anti-foaming Agents Production (2021-2026)

### 4.6 Rest of World Based Waterborne Anti-foaming Agents Manufacturers and Market Share, 2021-2026

#### 4.6.1 Rest of World Based Waterborne Anti-foaming Agents Manufacturers, Headquarters and Production Site (State, Country)

#### 4.6.2 Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production Value (2021-2026)

#### 4.6.3 Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production (2021-2026)

## 5 MARKET ANALYSIS BY TYPE

### 5.1 World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production by Type (2021-2032)

#### 5.3.2 World Waterborne Anti-foaming Agents Production Value by Type (2021-2032)

#### 5.3.3 World Waterborne Anti-foaming Agents Average Price by Type (2021-2032)

## 6 MARKET ANALYSIS BY CHEMICAL BASE

6.1 World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production by Chemical Base  
(2021-2032)

6.3.2 World Waterborne Anti-foaming Agents Production Value by Chemical Base  
(2021-2032)

6.3.3 World Waterborne Anti-foaming Agents Average Price by Chemical Base  
(2021-2032)

## **7 MARKET ANALYSIS BY SILICONE CONTENT**

7.1 World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production by Silicone Content  
(2021-2032)

7.3.2 World Waterborne Anti-foaming Agents Production Value by Silicone Content  
(2021-2032)

7.3.3 World Waterborne Anti-foaming Agents Average Price by Silicone Content  
(2021-2032)

## **8 MARKET ANALYSIS BY REGULATORY GRADE**

8.1 World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production by Regulatory Grade (2021-2032)

8.3.2 World Waterborne Anti-foaming Agents Production Value by Regulatory Grade (2021-2032)

8.3.3 World Waterborne Anti-foaming Agents Average Price by Regulatory Grade (2021-2032)

## **9 MARKET ANALYSIS BY APPLICATION**

9.1 World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production by Application (2021-2032)

9.3.2 World Waterborne Anti-foaming Agents Production Value by Application (2021-2032)

9.3.3 World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

10.1.4 BASF SE Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

10.2.4 BYK-Chemie GmbH Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services
  - 10.3.4 Evonik Industries AG Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services
  - 10.4.4 Wacker Chemie AG Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services
  - 10.5.4 M?NZING CHEMIE GmbH Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services
  - 10.6.4 CHT Germany GmbH Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

10.7.4 Elkem ASA Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.8.4 Mare S.p.A. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.9.4 Dow Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.10.4 Momentive Performance Materials Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.11.4 Applied Material Solutions, Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services
- 10.12.4 Crucible Chemical Company, Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services
- 10.13.4 Shin-Etsu Chemical Co., Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services
- 10.14.4 ADEKA Corporation Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services
- 10.15.4 Kao Corporation Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services
- 10.16.4 San Nopco Korea Co., Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

10.17.4 Rossari Biotech Limited Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.18.4 Resil Chemicals Pvt. Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

10.19.4 Fineotex Chemical Limited Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.20.4 Jiangsu Sixin Technology Application Research Institute Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.21.4 Foshan Nanhai Datian Chemical Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.22.4 Hubei Longsheng Sihai New Materials Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

10.23.4 Zhejiang Transfar Chemicals Group Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and

## Services

10.24.4 Marvel Chemical Co., Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Industry Chain

11.2 Waterborne Anti-foaming Agents Upstream Analysis

11.2.1 Waterborne Anti-foaming Agents Core Raw Materials

11.2.2 Main Manufacturers of Waterborne Anti-foaming Agents Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 Waterborne Anti-foaming Agents Production Mode

11.6 Waterborne Anti-foaming Agents Procurement Model

11.7 Waterborne Anti-foaming Agents Industry Sales Model and Sales Channels

11.7.1 Waterborne Anti-foaming Agents Sales Model

11.7.2 Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Waterborne Anti-foaming Agents Production Value by Region (2021-2026) & (USD Million)

Table 3. World Waterborne Anti-foaming Agents Production Value by Region (2027-2032) & (USD Million)

Table 4. World Waterborne Anti-foaming Agents Production Value Market Share by Region (2021-2026)

Table 5. World Waterborne Anti-foaming Agents Production Value Market Share by Region (2027-2032)

Table 6. World Waterborne Anti-foaming Agents Production by Region (2021-2026) & (Tons)

Table 7. World Waterborne Anti-foaming Agents Production by Region (2027-2032) & (Tons)

Table 8. World Waterborne Anti-foaming Agents Production Market Share by Region (2021-2026)

Table 9. World Waterborne Anti-foaming Agents Production Market Share by Region (2027-2032)

Table 10. World Waterborne Anti-foaming Agents Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Waterborne Anti-foaming Agents Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Waterborne Anti-foaming Agents Major Market Trends

Table 13. World Waterborne Anti-foaming Agents Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Waterborne Anti-foaming Agents Consumption by Region (2021-2026) & (Tons)

Table 15. World Waterborne Anti-foaming Agents Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Waterborne Anti-foaming Agents Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Waterborne Anti-foaming Agents Producers in 2025

Table 18. World Waterborne Anti-foaming Agents Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Waterborne Anti-foaming Agents Producers in 2025

Table 20. World Waterborne Anti-foaming Agents Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Waterborne Anti-foaming Agents Company Evaluation Quadrant

Table 22. World Waterborne Anti-foaming Agents Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Waterborne Anti-foaming Agents Production Site of Key Manufacturer

Table 24. Waterborne Anti-foaming Agents Market: Company Product Type Footprint

Table 25. Waterborne Anti-foaming Agents Market: Company Product Application Footprint

Table 26. Waterborne Anti-foaming Agents Competitive Factors

Table 27. Waterborne Anti-foaming Agents New Entrant and Capacity Expansion Plans

Table 28. Waterborne Anti-foaming Agents Mergers & Acquisitions Activity

Table 29. United States VS China Waterborne Anti-foaming Agents Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Waterborne Anti-foaming Agents Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Waterborne Anti-foaming Agents Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Waterborne Anti-foaming Agents Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Waterborne Anti-foaming Agents Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Waterborne Anti-foaming Agents Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Waterborne Anti-foaming Agents Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Waterborne Anti-foaming Agents Production Market Share (2021-2026)

Table 37. China Based Waterborne Anti-foaming Agents Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Waterborne Anti-foaming Agents Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Waterborne Anti-foaming Agents Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Waterborne Anti-foaming Agents Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Waterborne Anti-foaming Agents Production Market Share (2021-2026)

Table 42. Rest of World Based Waterborne Anti-foaming Agents Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production Market Share (2021-2026)

Table 47. World Waterborne Anti-foaming Agents Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Waterborne Anti-foaming Agents Production by Type (2021-2026) & (Tons)

Table 49. World Waterborne Anti-foaming Agents Production by Type (2027-2032) & (Tons)

Table 50. World Waterborne Anti-foaming Agents Production Value by Type (2021-2026) & (USD Million)

Table 51. World Waterborne Anti-foaming Agents Production Value by Type (2027-2032) & (USD Million)

Table 52. World Waterborne Anti-foaming Agents Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Waterborne Anti-foaming Agents Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Waterborne Anti-foaming Agents Production Value by Chemical Base, (USD Million), 2021 & 2025 & 2032

Table 55. World Waterborne Anti-foaming Agents Production by Chemical Base (2021-2026) & (Tons)

Table 56. World Waterborne Anti-foaming Agents Production by Chemical Base (2027-2032) & (Tons)

Table 57. World Waterborne Anti-foaming Agents Production Value by Chemical Base (2021-2026) & (USD Million)

Table 58. World Waterborne Anti-foaming Agents Production Value by Chemical Base (2027-2032) & (USD Million)

Table 59. World Waterborne Anti-foaming Agents Average Price by Chemical Base (2021-2026) & (US\$/Ton)

Table 60. World Waterborne Anti-foaming Agents Average Price by Chemical Base

(2027-2032) & (US\$/Ton)

Table 61. World Waterborne Anti-foaming Agents Production Value by Silicone Content, (USD Million), 2021 & 2025 & 2032

Table 62. World Waterborne Anti-foaming Agents Production by Silicone Content (2021-2026) & (Tons)

Table 63. World Waterborne Anti-foaming Agents Production by Silicone Content (2027-2032) & (Tons)

Table 64. World Waterborne Anti-foaming Agents Production Value by Silicone Content (2021-2026) & (USD Million)

Table 65. World Waterborne Anti-foaming Agents Production Value by Silicone Content (2027-2032) & (USD Million)

Table 66. World Waterborne Anti-foaming Agents Average Price by Silicone Content (2021-2026) & (US\$/Ton)

Table 67. World Waterborne Anti-foaming Agents Average Price by Silicone Content (2027-2032) & (US\$/Ton)

Table 68. World Waterborne Anti-foaming Agents Production Value by Regulatory Grade, (USD Million), 2021 & 2025 & 2032

Table 69. World Waterborne Anti-foaming Agents Production by Regulatory Grade (2021-2026) & (Tons)

Table 70. World Waterborne Anti-foaming Agents Production by Regulatory Grade (2027-2032) & (Tons)

Table 71. World Waterborne Anti-foaming Agents Production Value by Regulatory Grade (2021-2026) & (USD Million)

Table 72. World Waterborne Anti-foaming Agents Production Value by Regulatory Grade (2027-2032) & (USD Million)

Table 73. World Waterborne Anti-foaming Agents Average Price by Regulatory Grade (2021-2026) & (US\$/Ton)

Table 74. World Waterborne Anti-foaming Agents Average Price by Regulatory Grade (2027-2032) & (US\$/Ton)

Table 75. World Waterborne Anti-foaming Agents Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 76. World Waterborne Anti-foaming Agents Production by Application (2021-2026) & (Tons)

Table 77. World Waterborne Anti-foaming Agents Production by Application (2027-2032) & (Tons)

Table 78. World Waterborne Anti-foaming Agents Production Value by Application (2021-2026) & (USD Million)

Table 79. World Waterborne Anti-foaming Agents Production Value by Application (2027-2032) & (USD Million)

Table 80. World Waterborne Anti-foaming Agents Average Price by Application (2021-2026) & (US\$/Ton)

Table 81. World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 85. BASF SE Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 91. BYK-Chemie GmbH Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 97. Evonik Industries AG Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 103. Wacker Chemie AG Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 109. M?NZING CHEMIE GmbH Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 115. CHT Germany GmbH Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 121. Elkem ASA Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 127. Mare S.p.A. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 133. Dow Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 139. Momentive Performance Materials Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 145. Applied Material Solutions, Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 151. Crucible Chemical Company, Inc. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 157. Shin-Etsu Chemical Co., Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 163. ADEKA Corporation Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 169. Kao Corporation Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 175. San Nopco Korea Co., Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 181. Rossari Biotech Limited Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 187. Resil Chemicals Pvt. Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Product and Services

Table 193. Fineotex Chemical Limited Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 199. Jiangsu Sixin Technology Application Research Institute Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 205. Foshan Nanhai Datian Chemical Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 211. Hubei Longsheng Sihai New Materials Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 217. Zhejiang Transfar Chemicals Group Co., Ltd. Waterborne Anti-foaming Agents 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. Waterborne Anti-foaming Agents Product and Services

Table 223. Marvel Chemical Co., Ltd. Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Upstream (Raw Materials)
- Table 227. Global Waterborne Anti-foaming Agents Typical Customers
- Table 228. Waterborne Anti-foaming Agents Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Waterborne Anti-foaming Agents Picture

Figure 2. World Waterborne Anti-foaming Agents Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Waterborne Anti-foaming Agents Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Waterborne Anti-foaming Agents Production (2021-2032) & (Tons)

Figure 5. World Waterborne Anti-foaming Agents Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Waterborne Anti-foaming Agents Production Value Market Share by Region (2021-2032)

Figure 7. World Waterborne Anti-foaming Agents Production Market Share by Region (2021-2032)

Figure 8. North America Waterborne Anti-foaming Agents Production (2021-2032) & (Tons)

Figure 9. Europe Waterborne Anti-foaming Agents Production (2021-2032) & (Tons)

Figure 10. China Waterborne Anti-foaming Agents Production (2021-2032) & (Tons)

Figure 11. Japan Waterborne Anti-foaming Agents Production (2021-2032) & (Tons)

Figure 12. Waterborne Anti-foaming Agents Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 15. World Waterborne Anti-foaming Agents Consumption Market Share by Region (2021-2032)

Figure 16. United States Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 17. China Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 18. Europe Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 19. Japan Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 20. South Korea Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 22. India Waterborne Anti-foaming Agents Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Waterborne Anti-foaming Agents by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Waterborne Anti-foaming Agents Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Waterborne Anti-foaming Agents Markets in 2025

Figure 26. United States VS China: Waterborne Anti-foaming Agents Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Waterborne Anti-foaming Agents Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Waterborne Anti-foaming Agents Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Waterborne Anti-foaming Agents Production Market Share 2025

Figure 30. China Based Manufacturers Waterborne Anti-foaming Agents Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Waterborne Anti-foaming Agents Production Market Share 2025

Figure 32. World Waterborne Anti-foaming Agents Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Waterborne Anti-foaming Agents Production Value Market Share by Type in 2025

Figure 34. Formulation Defoamers

Figure 35. Process Antifoams

Figure 36. World Waterborne Anti-foaming Agents Production Market Share by Type (2021-2032)

Figure 37. World Waterborne Anti-foaming Agents Production Value Market Share by Type (2021-2032)

Figure 38. World Waterborne Anti-foaming Agents Average Price by Type (2021-2032) & (US\$/Ton)

Figure 39. World Waterborne Anti-foaming Agents Production Value by Chemical Base, (USD Million), 2021 & 2025 & 2032

Figure 40. World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production Market Share by Chemical Base (2021-2032)

Figure 46. World Waterborne Anti-foaming Agents Production Value Market Share by Chemical Base (2021-2032)

Figure 47. World Waterborne Anti-foaming Agents Average Price by Chemical Base

(2021-2032) & (US\$/Ton)

Figure 48. World Waterborne Anti-foaming Agents Production Value by Silicone Content, (USD Million), 2021 & 2025 & 2032

Figure 49. World Waterborne Anti-foaming Agents Production Value Market Share by Silicone Content in 2025

Figure 50. Silicone-Containing Defoamers

Figure 51. Silicone-Free Defoamers

Figure 52. World Waterborne Anti-foaming Agents Production Market Share by Silicone Content (2021-2032)

Figure 53. World Waterborne Anti-foaming Agents Production Value Market Share by Silicone Content (2021-2032)

Figure 54. World Waterborne Anti-foaming Agents Average Price by Silicone Content (2021-2032) & (US\$/Ton)

Figure 55. World Waterborne Anti-foaming Agents Production Value by Regulatory Grade, (USD Million), 2021 & 2025 & 2032

Figure 56. World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production Market Share by Regulatory Grade (2021-2032)

Figure 61. World Waterborne Anti-foaming Agents Production Value Market Share by Regulatory Grade (2021-2032)

Figure 62. World Waterborne Anti-foaming Agents Average Price by Regulatory Grade (2021-2032) & (US\$/Ton)

Figure 63. World Waterborne Anti-foaming Agents Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 64. World Waterborne Anti-foaming Agents 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 Waterborne Anti-foaming Agents Production Market Share by Application (2021-2032)

Figure 70. World Waterborne Anti-foaming Agents Production Value Market Share by Application (2021-2032)

Figure 71. World Waterborne Anti-foaming Agents Average Price by Application

(2021-2032) & (US\$/Ton)

Figure 72. Waterborne Anti-foaming Agents Industry Chain

Figure 73. Waterborne Anti-foaming Agents Procurement Model

Figure 74. Waterborne Anti-foaming Agents Sales Model

Figure 75. Waterborne Anti-foaming Agents Sales Channels, Direct Sales, and Distribution

Figure 76. Methodology

Figure 77. Research Process and Data Source

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