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Global Waterborne Polyurethane Defoamer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Waterborne Polyurethane Defoamer market size is expected to reach $ 319 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

Waterborne polyurethane defoamers are additives specifically designed to control and eliminate foam in waterborne polyurethane emulsions, coatings, adhesives, and other systems. They are typically composed of mineral oil, modified polyether esters, nonionic surfactants, or hydrophobic silica, and feature self-emulsification, high dispersibility, rapid defoaming, and long-lasting foam suppression, effectively solving pinhole and bubble problems caused by coating foam.

Upstream raw materials for water-based polyurethane defoamers primarily include polydimethylsiloxane, modified polysiloxanes, hydrophobic silica, mineral oils, polyethers, polyether-modified silicone oils, fatty acid esters, fatty alcohols, waxes, hydrophobic polymers, emulsifiers, dispersants, and water-based carriers. Among these, polysiloxanes and hydrophobic particles determine the foam-breaking speed of silicone-based products; mineral oils and waxes influence spreading and sustained foam-inhibition performance; and polyethers and silicone-free polymers primarily improve compatibility and recoatability. The midstream sector involves formulation design, emulsification and dispersion, compounding, stabilization, and quality control, with products typically supplied as emulsions, dispersions, or highly active concentrates. Downstream applications mainly involve formulations for water-based polyurethane coatings, adhesives, printing inks, and other water-based polyurethane products.

Global sales volume in 2025 is projected to be approximately 31,000 metric tons, with a comprehensive average price of around US$7,230 per metric ton and a gross profit

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margin of approximately 30%–40%.

The rising adoption of waterborne polyurethane in industrial coatings, synthetic leather, adhesives, and packaging printing is the primary driver of demand growth for waterborne polyurethane defoamers; meanwhile, low-VOC, APEO-free, and silicone-free products are seeing accelerated commercialization due to environmental regulations and demands for high surface quality. A key industry challenge lies in the inherent conflict between defoaming capability and system compatibility: excessive defoaming activity can lead to issues such as fish-eyes (craters), loss of gloss, and reduced inter-layer adhesion, whereas excessive compatibility may compromise long-term foam inhibition. Furthermore, product suitability varies significantly depending on factors such as polyurethane particle size, ionic type, thickening systems, and application methods. Future market trends point toward the development of composite products characterized by low dosage requirements, high durability, low VOC content, and the absence of silicone, as well as formulations tailored to specific waterborne polyurethane systems.

Report Scope

This report studies the global Waterborne Polyurethane Defoamer production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Waterborne Polyurethane Defoamer total production and demand, 2021-2032, (Tons)

Global Waterborne Polyurethane Defoamer total production value, 2021-2032, (USD Million)

Global Waterborne Polyurethane Defoamer production by region & country,

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production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Waterborne Polyurethane Defoamer consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Waterborne Polyurethane Defoamer domestic production, consumption, key domestic manufacturers and share

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

Global Waterborne Polyurethane Defoamer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Waterborne Polyurethane Defoamer production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Waterborne Polyurethane Defoamer 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, BYK, Dow, Evonik, Elementis, AFCONA, Milliken, Foshan Nanhai Datian Chemical, Hubei Longsheng Sihai New Materials, Dongguan Defeng Defoamer, 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 Polyurethane Defoamer 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

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forecast year.

Global Waterborne Polyurethane Defoamer Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Waterborne Polyurethane Defoamer Market, Segmentation by Type:

Silicone-based

Mineral Oil-based

Silicone-free Polymer-based

Other

Global Waterborne Polyurethane Defoamer Market, Segmentation by Active Content:

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?20%

20%–50%

>50%

Global Waterborne Polyurethane Defoamer Market, Segmentation by Carrier Form:

Water-Based Emulsion Type

Solvent-Diluted Type

Global Waterborne Polyurethane Defoamer Market, Segmentation by Application:

Water-based Coatings

Adhesives

Inks

Others

Companies Profiled:

BASF

BYK

Dow

Evonik

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Elementis

AFCONA

Milliken

Foshan Nanhai Datian Chemical

Hubei Longsheng Sihai New Materials

Dongguan Defeng Defoamer

Yantai Hengxin Chemical Technology

Key Questions Answered

1. How big is the global Waterborne Polyurethane Defoamer market?
2. What is the demand of the global Waterborne Polyurethane Defoamer market?
3. What is the year over year growth of the global Waterborne Polyurethane Defoamer market?
4. What is the total value of the global Waterborne Polyurethane Defoamer market?
5. Who are the Major Players in the global Waterborne Polyurethane Defoamer market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

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2.9 India Waterborne Polyurethane Defoamer Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

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4.2.1 United States VS China: Waterborne Polyurethane Defoamer Production Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Waterborne Polyurethane Defoamer Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Waterborne Polyurethane Defoamer Consumption Comparison
4.3.1 United States VS China: Waterborne Polyurethane Defoamer Consumption Comparison (2021 & 2025 & 2032)
4.3.2 United States VS China: Waterborne Polyurethane Defoamer Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Waterborne Polyurethane Defoamer Manufacturers and Market Share, 2021-2026
4.4.1 United States Based Waterborne Polyurethane Defoamer Manufacturers, Headquarters and Production Site (States, Country)
4.4.2 United States Based Manufacturers Waterborne Polyurethane Defoamer Production Value (2021-2026)
4.4.3 United States Based Manufacturers Waterborne Polyurethane Defoamer Production (2021-2026)
4.5 China Based Waterborne Polyurethane Defoamer Manufacturers and Market Share
4.5.1 China Based Waterborne Polyurethane Defoamer Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Waterborne Polyurethane Defoamer Production Value (2021-2026)
4.5.3 China Based Manufacturers Waterborne Polyurethane Defoamer Production (2021-2026)
4.6 Rest of World Based Waterborne Polyurethane Defoamer Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Waterborne Polyurethane Defoamer Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Waterborne Polyurethane Defoamer Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type

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5.2.1 Silicone-based
5.2.2 Mineral Oil-based
5.2.3 Silicone-free Polymer-based
5.2.4 Other
5.3 Market Segment by Type
5.3.1 World Waterborne Polyurethane Defoamer Production by Type (2021-2032)
5.3.2 World Waterborne Polyurethane Defoamer Production Value by Type (2021-2032)
5.3.3 World Waterborne Polyurethane Defoamer Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY ACTIVE CONTENT

6.1 World Waterborne Polyurethane Defoamer Market Size Overview by Active Content: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Active Content
6.2.1 ?20%
6.2.2 20%–50%
6.2.3 >50%
6.3 Market Segment by Active Content
6.3.1 World Waterborne Polyurethane Defoamer Production by Active Content (2021-2032)
6.3.2 World Waterborne Polyurethane Defoamer Production Value by Active Content (2021-2032)
6.3.3 World Waterborne Polyurethane Defoamer Average Price by Active Content (2021-2032)

7 MARKET ANALYSIS BY CARRIER FORM

7.1 World Waterborne Polyurethane Defoamer Market Size Overview by Carrier Form: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Carrier Form
7.2.1 Water-Based Emulsion Type
7.2.2 Solvent-Diluted Type
7.3 Market Segment by Carrier Form
7.3.1 World Waterborne Polyurethane Defoamer Production by Carrier Form (2021-2032)
7.3.2 World Waterborne Polyurethane Defoamer Production Value by Carrier Form (2021-2032)
7.3.3 World Waterborne Polyurethane Defoamer Average Price by Carrier Form

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(2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Waterborne Polyurethane Defoamer Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
  8.2.1 Water-based Coatings
  8.2.2 Adhesives
  8.2.3 Inks
  8.2.4 Others
8.3 Market Segment by Application
  8.3.1 World Waterborne Polyurethane Defoamer Production by Application (2021-2032)
  8.3.2 World Waterborne Polyurethane Defoamer Production Value by Application (2021-2032)
  8.3.3 World Waterborne Polyurethane Defoamer Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 BASF
  9.1.1 BASF Details
  9.1.2 BASF Major Business
  9.1.3 BASF Waterborne Polyurethane Defoamer Product and Services
  9.1.4 BASF Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  9.1.5 BASF Recent Developments/Updates
  9.1.6 BASF Competitive Strengths & Weaknesses
9.2 BYK
  9.2.1 BYK Details
  9.2.2 BYK Major Business
  9.2.3 BYK Waterborne Polyurethane Defoamer Product and Services
  9.2.4 BYK Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
  9.2.5 BYK Recent Developments/Updates
  9.2.6 BYK Competitive Strengths & Weaknesses
9.3 Dow
  9.3.1 Dow Details

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9.3.2 Dow Major Business
9.3.3 Dow Waterborne Polyurethane Defoamer Product and Services
9.3.4 Dow Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Dow Recent Developments/Updates
9.3.6 Dow Competitive Strengths & Weaknesses
9.4 Evonik
9.4.1 Evonik Details
9.4.2 Evonik Major Business
9.4.3 Evonik Waterborne Polyurethane Defoamer Product and Services
9.4.4 Evonik Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 Evonik Recent Developments/Updates
9.4.6 Evonik Competitive Strengths & Weaknesses
9.5 Elementis
9.5.1 Elementis Details
9.5.2 Elementis Major Business
9.5.3 Elementis Waterborne Polyurethane Defoamer Product and Services
9.5.4 Elementis Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 Elementis Recent Developments/Updates
9.5.6 Elementis Competitive Strengths & Weaknesses
9.6 AFCONA
9.6.1 AFCONA Details
9.6.2 AFCONA Major Business
9.6.3 AFCONA Waterborne Polyurethane Defoamer Product and Services
9.6.4 AFCONA Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 AFCONA Recent Developments/Updates
9.6.6 AFCONA Competitive Strengths & Weaknesses
9.7 Milliken
9.7.1 Milliken Details
9.7.2 Milliken Major Business
9.7.3 Milliken Waterborne Polyurethane Defoamer Product and Services
9.7.4 Milliken Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Milliken Recent Developments/Updates
9.7.6 Milliken Competitive Strengths & Weaknesses
9.8 Foshan Nanhai Datian Chemical

+357 96 030922
info@marketpublishers.com

9.8.1 Foshan Nanhai Datian Chemical Details
9.8.2 Foshan Nanhai Datian Chemical Major Business
9.8.3 Foshan Nanhai Datian Chemical Waterborne Polyurethane Defoamer Product and Services
9.8.4 Foshan Nanhai Datian Chemical Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 Foshan Nanhai Datian Chemical Recent Developments/Updates
9.8.6 Foshan Nanhai Datian Chemical Competitive Strengths & Weaknesses
9.9 Hubei Longsheng Sihai New Materials
9.9.1 Hubei Longsheng Sihai New Materials Details
9.9.2 Hubei Longsheng Sihai New Materials Major Business
9.9.3 Hubei Longsheng Sihai New Materials Waterborne Polyurethane Defoamer Product and Services
9.9.4 Hubei Longsheng Sihai New Materials Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Hubei Longsheng Sihai New Materials Recent Developments/Updates
9.9.6 Hubei Longsheng Sihai New Materials Competitive Strengths & Weaknesses
9.10 Dongguan Defeng Defoamer
9.10.1 Dongguan Defeng Defoamer Details
9.10.2 Dongguan Defeng Defoamer Major Business
9.10.3 Dongguan Defeng Defoamer Waterborne Polyurethane Defoamer Product and Services
9.10.4 Dongguan Defeng Defoamer Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Dongguan Defeng Defoamer Recent Developments/Updates
9.10.6 Dongguan Defeng Defoamer Competitive Strengths & Weaknesses
9.11 Yantai Hengxin Chemical Technology
9.11.1 Yantai Hengxin Chemical Technology Details
9.11.2 Yantai Hengxin Chemical Technology Major Business
9.11.3 Yantai Hengxin Chemical Technology Waterborne Polyurethane Defoamer Product and Services
9.11.4 Yantai Hengxin Chemical Technology Waterborne Polyurethane Defoamer Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Yantai Hengxin Chemical Technology Recent Developments/Updates
9.11.6 Yantai Hengxin Chemical Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Waterborne Polyurethane Defoamer Industry Chain

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10.2 Waterborne Polyurethane Defoamer Upstream Analysis
10.2.1 Waterborne Polyurethane Defoamer Core Raw Materials
10.2.2 Main Manufacturers of Waterborne Polyurethane Defoamer Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Waterborne Polyurethane Defoamer Production Mode
10.6 Waterborne Polyurethane Defoamer Procurement Model
10.7 Waterborne Polyurethane Defoamer Industry Sales Model and Sales Channels
10.7.1 Waterborne Polyurethane Defoamer Sales Model
10.7.2 Waterborne Polyurethane Defoamer Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

+357 96 030922
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List Of Tables

LIST OF TABLES

Table 1. World Waterborne Polyurethane Defoamer Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Waterborne Polyurethane Defoamer Production Value by Region (2021-2026) & (USD Million)
Table 3. World Waterborne Polyurethane Defoamer Production Value by Region (2027-2032) & (USD Million)
Table 4. World Waterborne Polyurethane Defoamer Production Value Market Share by Region (2021-2026)
Table 5. World Waterborne Polyurethane Defoamer Production Value Market Share by Region (2027-2032)
Table 6. World Waterborne Polyurethane Defoamer Production by Region (2021-2026) & (Tons)
Table 7. World Waterborne Polyurethane Defoamer Production by Region (2027-2032) & (Tons)
Table 8. World Waterborne Polyurethane Defoamer Production Market Share by Region (2021-2026)
Table 9. World Waterborne Polyurethane Defoamer Production Market Share by Region (2027-2032)
Table 10. World Waterborne Polyurethane Defoamer Average Price by Region (2021-2026) & (US$/Ton)
Table 11. World Waterborne Polyurethane Defoamer Average Price by Region (2027-2032) & (US$/Ton)
Table 12. Waterborne Polyurethane Defoamer Major Market Trends
Table 13. World Waterborne Polyurethane Defoamer Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
Table 14. World Waterborne Polyurethane Defoamer Consumption by Region (2021-2026) & (Tons)
Table 15. World Waterborne Polyurethane Defoamer Consumption Forecast by Region (2027-2032) & (Tons)
Table 16. World Waterborne Polyurethane Defoamer Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Waterborne Polyurethane Defoamer Producers in 2025
Table 18. World Waterborne Polyurethane Defoamer Production by Manufacturer (2021-2026) & (Tons)

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Table 19. Production Market Share of Key Waterborne Polyurethane Defoamer Producers in 2025
Table 20. World Waterborne Polyurethane Defoamer Average Price by Manufacturer (2021-2026) & (US$/Ton)
Table 21. Global Waterborne Polyurethane Defoamer Company Evaluation Quadrant
Table 22. World Waterborne Polyurethane Defoamer Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Waterborne Polyurethane Defoamer Production Site of Key Manufacturer
Table 24. Waterborne Polyurethane Defoamer Market: Company Product Type Footprint
Table 25. Waterborne Polyurethane Defoamer Market: Company Product Application Footprint
Table 26. Waterborne Polyurethane Defoamer Competitive Factors
Table 27. Waterborne Polyurethane Defoamer New Entrant and Capacity Expansion Plans
Table 28. Waterborne Polyurethane Defoamer Mergers & Acquisitions Activity
Table 29. United States VS China Waterborne Polyurethane Defoamer Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Waterborne Polyurethane Defoamer Production Comparison, (2021 & 2025 & 2032) & (Tons)
Table 31. United States VS China Waterborne Polyurethane Defoamer Consumption Comparison, (2021 & 2025 & 2032) & (Tons)
Table 32. United States Based Waterborne Polyurethane Defoamer Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Waterborne Polyurethane Defoamer Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Waterborne Polyurethane Defoamer Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Waterborne Polyurethane Defoamer Production (2021-2026) & (Tons)
Table 36. United States Based Manufacturers Waterborne Polyurethane Defoamer Production Market Share (2021-2026)
Table 37. China Based Waterborne Polyurethane Defoamer Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Waterborne Polyurethane Defoamer Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Waterborne Polyurethane Defoamer Production Value Market Share (2021-2026)

+357 96 030922
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Table 40. China Based Manufacturers Waterborne Polyurethane Defoamer Production, (2021-2026) & (Tons)
Table 41. China Based Manufacturers Waterborne Polyurethane Defoamer Production Market Share (2021-2026)
Table 42. Rest of World Based Waterborne Polyurethane Defoamer Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production, (2021-2026) & (Tons)
Table 46. Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production Market Share (2021-2026)
Table 47. World Waterborne Polyurethane Defoamer Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Waterborne Polyurethane Defoamer Production by Type (2021-2026) & (Tons)
Table 49. World Waterborne Polyurethane Defoamer Production by Type (2027-2032) & (Tons)
Table 50. World Waterborne Polyurethane Defoamer Production Value by Type (2021-2026) & (USD Million)
Table 51. World Waterborne Polyurethane Defoamer Production Value by Type (2027-2032) & (USD Million)
Table 52. World Waterborne Polyurethane Defoamer Average Price by Type (2021-2026) & (US$/Ton)
Table 53. World Waterborne Polyurethane Defoamer Average Price by Type (2027-2032) & (US$/Ton)
Table 54. World Waterborne Polyurethane Defoamer Production Value by Active Content, (USD Million), 2021 & 2025 & 2032
Table 55. World Waterborne Polyurethane Defoamer Production by Active Content (2021-2026) & (Tons)
Table 56. World Waterborne Polyurethane Defoamer Production by Active Content (2027-2032) & (Tons)
Table 57. World Waterborne Polyurethane Defoamer Production Value by Active Content (2021-2026) & (USD Million)
Table 58. World Waterborne Polyurethane Defoamer Production Value by Active Content (2027-2032) & (USD Million)
Table 59. World Waterborne Polyurethane Defoamer Average Price by Active Content

+357 96 030922
info@marketpublishers.com

(2021-2026) & (US$/Ton)
Table 60. World Waterborne Polyurethane Defoamer Average Price by Active Content (2027-2032) & (US$/Ton)
Table 61. World Waterborne Polyurethane Defoamer Production Value by Carrier Form, (USD Million), 2021 & 2025 & 2032
Table 62. World Waterborne Polyurethane Defoamer Production by Carrier Form (2021-2026) & (Tons)
Table 63. World Waterborne Polyurethane Defoamer Production by Carrier Form (2027-2032) & (Tons)
Table 64. World Waterborne Polyurethane Defoamer Production Value by Carrier Form (2021-2026) & (USD Million)
Table 65. World Waterborne Polyurethane Defoamer Production Value by Carrier Form (2027-2032) & (USD Million)
Table 66. World Waterborne Polyurethane Defoamer Average Price by Carrier Form (2021-2026) & (US$/Ton)
Table 67. World Waterborne Polyurethane Defoamer Average Price by Carrier Form (2027-2032) & (US$/Ton)
Table 68. World Waterborne Polyurethane Defoamer Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Waterborne Polyurethane Defoamer Production by Application (2021-2026) & (Tons)
Table 70. World Waterborne Polyurethane Defoamer Production by Application (2027-2032) & (Tons)
Table 71. World Waterborne Polyurethane Defoamer Production Value by Application (2021-2026) & (USD Million)
Table 72. World Waterborne Polyurethane Defoamer Production Value by Application (2027-2032) & (USD Million)
Table 73. World Waterborne Polyurethane Defoamer Average Price by Application (2021-2026) & (US$/Ton)
Table 74. World Waterborne Polyurethane Defoamer Average Price by Application (2027-2032) & (US$/Ton)
Table 75. BASF Basic Information, Manufacturing Base and Competitors
Table 76. BASF Major Business
Table 77. BASF Waterborne Polyurethane Defoamer Product and Services
Table 78. BASF Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. BASF Recent Developments/Updates
Table 80. BASF Competitive Strengths & Weaknesses

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Table 81. BYK Basic Information, Manufacturing Base and Competitors
Table 82. BYK Major Business
Table 83. BYK Waterborne Polyurethane Defoamer Product and Services
Table 84. BYK Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. BYK Recent Developments/Updates
Table 86. BYK Competitive Strengths & Weaknesses
Table 87. Dow Basic Information, Manufacturing Base and Competitors
Table 88. Dow Major Business
Table 89. Dow Waterborne Polyurethane Defoamer Product and Services
Table 90. Dow Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Dow Recent Developments/Updates
Table 92. Dow Competitive Strengths & Weaknesses
Table 93. Evonik Basic Information, Manufacturing Base and Competitors
Table 94. Evonik Major Business
Table 95. Evonik Waterborne Polyurethane Defoamer Product and Services
Table 96. Evonik Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Evonik Recent Developments/Updates
Table 98. Evonik Competitive Strengths & Weaknesses
Table 99. Elementis Basic Information, Manufacturing Base and Competitors
Table 100. Elementis Major Business
Table 101. Elementis Waterborne Polyurethane Defoamer Product and Services
Table 102. Elementis Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Elementis Recent Developments/Updates
Table 104. Elementis Competitive Strengths & Weaknesses
Table 105. AFCONA Basic Information, Manufacturing Base and Competitors
Table 106. AFCONA Major Business
Table 107. AFCONA Waterborne Polyurethane Defoamer Product and Services
Table 108. AFCONA Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. AFCONA Recent Developments/Updates

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Table 110. AFCONA Competitive Strengths & Weaknesses
Table 111. Milliken Basic Information, Manufacturing Base and Competitors
Table 112. Milliken Major Business
Table 113. Milliken Waterborne Polyurethane Defoamer Product and Services
Table 114. Milliken Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Milliken Recent Developments/Updates
Table 116. Milliken Competitive Strengths & Weaknesses
Table 117. Foshan Nanhai Datian Chemical Basic Information, Manufacturing Base and Competitors
Table 118. Foshan Nanhai Datian Chemical Major Business
Table 119. Foshan Nanhai Datian Chemical Waterborne Polyurethane Defoamer Product and Services
Table 120. Foshan Nanhai Datian Chemical Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. Foshan Nanhai Datian Chemical Recent Developments/Updates
Table 122. Foshan Nanhai Datian Chemical Competitive Strengths & Weaknesses
Table 123. Hubei Longsheng Sihai New Materials Basic Information, Manufacturing Base and Competitors
Table 124. Hubei Longsheng Sihai New Materials Major Business
Table 125. Hubei Longsheng Sihai New Materials Waterborne Polyurethane Defoamer Product and Services
Table 126. Hubei Longsheng Sihai New Materials Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Hubei Longsheng Sihai New Materials Recent Developments/Updates
Table 128. Hubei Longsheng Sihai New Materials Competitive Strengths & Weaknesses
Table 129. Dongguan Defeng Defoamer Basic Information, Manufacturing Base and Competitors
Table 130. Dongguan Defeng Defoamer Major Business
Table 131. Dongguan Defeng Defoamer Waterborne Polyurethane Defoamer Product and Services
Table 132. Dongguan Defeng Defoamer Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Dongguan Defeng Defoamer Recent Developments/Updates

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Table 134. Dongguan Defeng Defoamer Competitive Strengths & Weaknesses
Table 135. Yantai Hengxin Chemical Technology Basic Information, Manufacturing Base and Competitors
Table 136. Yantai Hengxin Chemical Technology Major Business
Table 137. Yantai Hengxin Chemical Technology Waterborne Polyurethane Defoamer Product and Services
Table 138. Yantai Hengxin Chemical Technology Waterborne Polyurethane Defoamer Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Yantai Hengxin Chemical Technology Recent Developments/Updates
Table 140. Yantai Hengxin Chemical Technology Competitive Strengths & Weaknesses
Table 141. Global Key Players of Waterborne Polyurethane Defoamer Upstream (Raw Materials)
Table 142. Global Waterborne Polyurethane Defoamer Typical Customers
Table 143. Waterborne Polyurethane Defoamer Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Waterborne Polyurethane Defoamer Picture
Figure 2. World Waterborne Polyurethane Defoamer Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Waterborne Polyurethane Defoamer Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Waterborne Polyurethane Defoamer Production (2021-2032) & (Tons)
Figure 5. World Waterborne Polyurethane Defoamer Average Price (2021-2032) & (US$/Ton)
Figure 6. World Waterborne Polyurethane Defoamer Production Value Market Share by Region (2021-2032)
Figure 7. World Waterborne Polyurethane Defoamer Production Market Share by Region (2021-2032)
Figure 8. North America Waterborne Polyurethane Defoamer Production (2021-2032) & (Tons)
Figure 9. Europe Waterborne Polyurethane Defoamer Production (2021-2032) & (Tons)
Figure 10. China Waterborne Polyurethane Defoamer Production (2021-2032) & (Tons)
Figure 11. Southeast Asia Waterborne Polyurethane Defoamer Production (2021-2032) & (Tons)
Figure 12. Waterborne Polyurethane Defoamer Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 15. World Waterborne Polyurethane Defoamer Consumption Market Share by Region (2021-2032)
Figure 16. United States Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 17. China Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 18. Europe Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 19. Japan Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 20. South Korea Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 21. ASEAN Waterborne Polyurethane Defoamer Consumption (2021-2032) &

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(Tons)
Figure 22. India Waterborne Polyurethane Defoamer Consumption (2021-2032) & (Tons)
Figure 23. Producer Shipments of Waterborne Polyurethane Defoamer by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Waterborne Polyurethane Defoamer Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Waterborne Polyurethane Defoamer Markets in 2025
Figure 26. United States VS China: Waterborne Polyurethane Defoamer Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Waterborne Polyurethane Defoamer Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Waterborne Polyurethane Defoamer Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Waterborne Polyurethane Defoamer Production Market Share 2025
Figure 30. China Based Manufacturers Waterborne Polyurethane Defoamer Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Waterborne Polyurethane Defoamer Production Market Share 2025
Figure 32. World Waterborne Polyurethane Defoamer Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Waterborne Polyurethane Defoamer Production Value Market Share by Type in 2025
Figure 34. Silicone-based
Figure 35. Mineral Oil-based
Figure 36. Silicone-free Polymer-based
Figure 37. Other
Figure 38. World Waterborne Polyurethane Defoamer Production Market Share by Type (2021-2032)
Figure 39. World Waterborne Polyurethane Defoamer Production Value Market Share by Type (2021-2032)
Figure 40. World Waterborne Polyurethane Defoamer Average Price by Type (2021-2032) & (US$/Ton)
Figure 41. World Waterborne Polyurethane Defoamer Production Value by Active Content, (USD Million), 2021 & 2025 & 2032
Figure 42. World Waterborne Polyurethane Defoamer Production Value Market Share by Active Content in 2025

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Figure 43. ?20%
Figure 44. 20%–50%
Figure 45. >50%
Figure 46. World Waterborne Polyurethane Defoamer Production Market Share by Active Content (2021-2032)
Figure 47. World Waterborne Polyurethane Defoamer Production Value Market Share by Active Content (2021-2032)
Figure 48. World Waterborne Polyurethane Defoamer Average Price by Active Content (2021-2032) & (US$/Ton)
Figure 49. World Waterborne Polyurethane Defoamer Production Value by Carrier Form, (USD Million), 2021 & 2025 & 2032
Figure 50. World Waterborne Polyurethane Defoamer Production Value Market Share by Carrier Form in 2025
Figure 51. Water-Based Emulsion Type
Figure 52. Solvent-Diluted Type
Figure 53. World Waterborne Polyurethane Defoamer Production Market Share by Carrier Form (2021-2032)
Figure 54. World Waterborne Polyurethane Defoamer Production Value Market Share by Carrier Form (2021-2032)
Figure 55. World Waterborne Polyurethane Defoamer Average Price by Carrier Form (2021-2032) & (US$/Ton)
Figure 56. World Waterborne Polyurethane Defoamer Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 57. World Waterborne Polyurethane Defoamer Production Value Market Share by Application in 2025
Figure 58. Water-based Coatings
Figure 59. Adhesives
Figure 60. Inks
Figure 61. Others
Figure 62. World Waterborne Polyurethane Defoamer Production Market Share by Application (2021-2032)
Figure 63. World Waterborne Polyurethane Defoamer Production Value Market Share by Application (2021-2032)
Figure 64. World Waterborne Polyurethane Defoamer Average Price by Application (2021-2032) & (US$/Ton)
Figure 65. Waterborne Polyurethane Defoamer Industry Chain
Figure 66. Waterborne Polyurethane Defoamer Procurement Model
Figure 67. Waterborne Polyurethane Defoamer Sales Model
Figure 68. Waterborne Polyurethane Defoamer Sales Channels, Direct Sales, and

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Distribution
Figure 69. Methodology
Figure 70. Research Process and Data Source

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