

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

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Abstracts

The global Waterborne Polyurethane market size is expected to reach \$ 3765 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

Waterborne Polyurethane refers to a polyurethane resin system in which water is used as the primary dispersion medium. It is typically produced from polyols, isocyanates, hydrophilic chain extenders, neutralizing agents and other additives through prepolymerization, chain extension, emulsification or self-dispersion processes. Commercial forms mainly include waterborne polyurethane dispersions, waterborne polyurethane emulsions and waterborne polyurethane resins. The product is generally supplied as a milky or translucent liquid and is valued for film-forming ability, flexibility, abrasion resistance, adhesion and low volatile organic compound emissions, making it an important alternative to solvent-based polyurethane systems in environmentally regulated and low-odor applications.

In terms of industrial geography, major production bases are concentrated in China, Germany, the United States, Japan, South Korea and Taiwan, China. Key applications include wood and industrial coatings, automotive interiors, synthetic and natural leather finishing, textile finishing, footwear adhesives, packaging and ink binders. China and the broader Asia-Pacific region have become important incremental markets, supported by synthetic leather, footwear, textile and consumer goods manufacturing demand.

In 2025, global Waterborne Polyurethane production reached approximately 650 to 800 kilotons. Mainstream commercial products were primarily waterborne polyurethane dispersions and resins with a solids content of 30% to 45%, and global FOB prices generally ranged from USD 2.8 to USD 3.8 per kg. High-performance aliphatic, self-crosslinking, hydrolysis-resistant or high-solids grades were priced above standard

industrial grades. In 2026, global demand is expected to remain on a mid-to-high single-digit growth trajectory, supported by low-VOC regulations, waterborne conversion in automotive interiors, upgrading demand in synthetic leather and textile coatings, and substitution of solvent-based systems in wood and industrial coatings.

The global Waterborne Polyurethane market is being driven by both environmental substitution and high-performance material upgrading. Coatings, adhesives, leather finishing, textile finishing and ink industries are reducing solvent use, while waterborne systems offer clear advantages in low odor, low volatile organic compound emissions, safer application and regulatory compliance. At the same time, downstream customers are raising requirements for abrasion resistance, scratch resistance, hydrolysis resistance, flexibility, tactile performance and film-forming efficiency, pushing waterborne polyurethane from a basic environmental substitute toward a functional resin platform. Automotive interiors, consumer electronics protective films, sports footwear materials, furniture and wood coatings, and premium synthetic leather are increasing adoption of aliphatic, solvent-free, high-solids, self-crosslinking and polyurethane-acrylic hybrid systems, supporting higher product value.

Market challenges are concentrated in cost, performance boundaries and supply-chain stability. Compared with some conventional solvent-based systems, waterborne polyurethane still requires formulation coordination and process optimization in drying efficiency, low-temperature film formation, water and chemical resistance, and adhesion to complex substrates. High-end applications also impose stricter requirements on resin stability, particle-size control and batch consistency. In addition, fluctuations in isocyanate, polyol, chain extender and additive prices can affect supplier margins, while rapid capacity expansion by local Chinese producers is intensifying price competition in mid- and low-end grades. Overall, global demand is expected to shift from simple environmental replacement to performance-led growth, and suppliers with high-solids, low residual solvent, fast-drying, crosslinkable and customized formulation capabilities are likely to capture stronger pricing power.

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

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

Highlights and key features of the study

Global Waterborne Polyurethane total production and demand, 2021-2032, (K MT)

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

Global Waterborne Polyurethane production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Waterborne Polyurethane consumption by region & country, CAGR, 2021-2032 & (K MT)

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

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

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

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

This report profiles key players in the global Waterborne Polyurethane 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 Covestro AG, BASF SE, The Lubrizol Corporation, UBE Corporation, PTT Global Chemical Public Company Limited, allnex Business, Alberdingk Boley GmbH, Lamberti S.p.A., Stahl Holdings B.V., C. L. Hawthaway and Sons Corporation, Chase Corporation, 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 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Polyurethane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Waterborne Polyurethane Market, Segmentation by Type:

Polyurethane Dispersion

Polyurethane Emulsion

Polyurethane Acrylic Hybrid Resin

Others

Global Waterborne Polyurethane Market, Segmentation by Chemistry:

Anionic Polyurethane

Cationic Polyurethane

Nonionic Polyurethane

Global Waterborne Polyurethane Market, Segmentation by Isocyanate Type:

Aliphatic Isocyanate Based

Aromatic Isocyanate Based

Others

Global Waterborne Polyurethane Market, Segmentation by Polyol Base:

Polyester Based Waterborne Polyurethane

Polyether Based Waterborne Polyurethane

Polycarbonate Based Waterborne Polyurethane

Others

Global Waterborne Polyurethane Market, Segmentation by Application:

Paints and Coatings

Adhesives and Sealants

Leather and Synthetic Leather Finishing

Others

Companies Profiled:

Covestro AG

BASF SE

The Lubrizol Corporation

UBE Corporation

PTT Global Chemical Public Company Limited, allnex Business

Alberdingk Boley GmbH

Lamberti S.p.A.

Stahl Holdings B.V.

C. L. Hawthaway and Sons Corporation

Chase Corporation

Sika AG, Incorez Business

Mitsui Chemicals, Inc.

DIC Corporation

ADEKA Corporation

Sanyo Chemical Industries, Ltd.

Wanhua Chemical Group Co., Ltd.

Huafon Group Co., Ltd.

Huide Science and Technology Co., Ltd.

Huada Chemical Group Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Taiwan PU Corporation

Great Eastern Resins Industrial Co., Ltd.

Susan Materials Co., Ltd.

Texochem Industries

Key Questions Answered:

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

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