

Global Polyurethane Dispersions for Adhesives Market Growth 2026-2032

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Abstracts

The global Polyurethane Dispersions for Adhesives market size is predicted to grow from US\$ 626 million in 2025 to US\$ 1028 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

Polyurethane dispersions for adhesives are waterborne resin materials in which polyurethane polymer particles are dispersed in water and function as the main bonding polymer in adhesive formulations. They are mainly used to produce environmentally oriented waterborne polyurethane adhesives or as core film-forming binder resins in adhesive systems. The product is typically supplied as a milky white or semi-transparent liquid and can be designed based on polyester, polyether, polycarbonate, or modified polyurethane systems, providing good initial tack, peel strength, flexibility, heat resistance, hydrolysis resistance, humidity resistance, and low volatile emissions.

Major production and consumption regions include China, Germany, the United States, Japan, South Korea, Taiwan, Italy, and India. Typical applications include footwear adhesives, furniture and woodworking adhesives, automotive interior lamination adhesives, packaging lamination adhesives, textile bonding adhesives, leather lamination adhesives, film lamination adhesives, and consumer goods assembly adhesives. The recommended report scope includes waterborne polyurethane dispersions and waterborne PU adhesive resins used in adhesive formulations, while excluding solvent-based polyurethane adhesives, polyurethane hot-melt adhesives, polyurethane sealants, polyurethane dispersions for coatings, and non-adhesive applications.

In 2025, global production of polyurethane dispersions for adhesives reached approximately 190,000 to 225,000 tons, with mainstream FOB prices ranging from USD

2.65 to USD 3.45 per kg. Products used in footwear, furniture, and general lamination adhesives were generally priced toward the lower end, while automotive interior, high-heat-resistance, high-hydrolysis-resistance, high-peel-strength, two-component crosslinking, and heat-activated grades were positioned near the upper end. From 2026 to 2032, substitution of low-VOC adhesive systems, waterborne conversion in footwear and furniture manufacturing, lightweight automotive interior lamination, and upgrades in packaging and textile composite materials are expected to support steady demand growth for polyurethane dispersions for adhesives.

The global market for polyurethane dispersions for adhesives is benefiting from low-VOC material substitution, greener downstream manufacturing, and the expansion of composite-material applications. In earlier stages, waterborne PUD adhesives were mainly used to replace selected solvent-based polyurethane adhesives, reducing organic solvent emissions, improving workplace conditions, and helping footwear, furniture, automotive, and packaging customers meet environmental compliance requirements. Today, market attention has moved beyond environmental attributes toward integrated bonding performance, including initial tack, peel strength, heat resistance, humidity resistance, hydrolysis resistance, flexibility, aging resistance, and compatibility across different substrates. Footwear, leather goods, furniture, woodworking, and general lamination remain the core application base, while automotive interiors, lightweight composite materials, functional textiles, flexible packaging, and premium consumer goods assembly are becoming higher-value growth areas.

The main challenges come from cost pressure, differences in application processes, and technical barriers in high-performance use cases. Compared with mature solvent-based systems, waterborne polyurethane dispersions still require precise formulation support in drying speed, open time, heat-activation window, low-temperature bonding, water whitening resistance, and durability under extreme conditions. Price volatility in isocyanates, polyols, chain extenders, crosslinkers, and functional additives can also affect producer profitability. Low-to-mid-end footwear, furniture, and packaging adhesive markets remain highly price-competitive, and some customers still prefer lower-cost EVA emulsions, acrylic emulsions, or solvent-based adhesives. Over the long term, however, stricter global low-VOC regulation, environmental audits across brand supply chains, lightweighting trends in automotive and consumer products, and waterborne conversion in Asian manufacturing will continue to raise the penetration rate of polyurethane dispersions for adhesives and drive product development toward higher solid content, faster drying, stronger bonding, lower odor, and greater customization.

LP Information, Inc. (LPI) ' newest research report, the "Polyurethane Dispersions for Adhesives Industry Forecast" looks at past sales and reviews total world Polyurethane Dispersions for Adhesives sales in 2025, providing a comprehensive analysis by region and market sector of projected Polyurethane Dispersions for Adhesives sales for 2026 through 2032. With Polyurethane Dispersions for Adhesives sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Polyurethane Dispersions for Adhesives industry.

This Insight Report provides a comprehensive analysis of the global Polyurethane Dispersions for Adhesives landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Polyurethane Dispersions for Adhesives portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Polyurethane Dispersions for Adhesives market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Polyurethane Dispersions for Adhesives and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Polyurethane Dispersions for Adhesives.

This report presents a comprehensive overview, market shares, and growth opportunities of Polyurethane Dispersions for Adhesives market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

One Component System

Two Component Crosslinking System

Self Crosslinking System

Segmentation by Chemistry:

Polyester Polyurethane Dispersion

Polyether Polyurethane Dispersion

Polycarbonate Polyurethane Dispersion

Modified Polyurethane Dispersion

Segmentation by Solid Content:

Medium Solid Content

High Solid Content

Low Solid Content

Segmentation by Ionic Character:

Anionic Polyurethane Dispersion

Nonionic Polyurethane Dispersion

Cationic Polyurethane Dispersion

Segmentation by Application:

Footwear and Leather Goods

Furniture and Building Materials

Automotive and Transportation

Packaging and Consumer Goods

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Covestro AG

BASF SE

Henkel AG and Co. KGaA

UBE Corporation

DIC Corporation

Mitsui Chemicals, Inc.

Dainichiseika Color and Chemicals Mfg. Co., Ltd.

Sanyo Chemical Industries, Ltd.

Lubrizol Corporation

Hauthaway Corporation

Chase Corporation

H.B. Fuller Company

Jowat SE

Alberdingk Boley GmbH

Lamberti S.p.A.

SIWO US Inc.

Wanhua Chemical Group Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Anhui Anda Huatai New Materials Co., Ltd.

Nan Pao Resins Chemical Co., Ltd.

Great Eastern Resins Industrial Co., Ltd.

Taiwan PU Corporation

Susan Materials Co., Ltd.

Kangnam Chemical Co., Ltd.

Hemanjali Polymers Pvt. Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Polyurethane Dispersions for Adhesives market?

What factors are driving Polyurethane Dispersions for Adhesives market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Polyurethane Dispersions for Adhesives market opportunities vary by end market size?

How does Polyurethane Dispersions for Adhesives break out by Type, by Application?

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