

Global Polyurethane Dispersions for Footwear Materials Market Growth 2026-2032

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Abstracts

The global Polyurethane Dispersions for Footwear Materials market size is predicted to grow from US\$ 421 million in 2025 to US\$ 685 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 2032.

Polyurethane dispersions for footwear materials are waterborne resin materials in which polyurethane polymer particles are dispersed in water and function as key bonding or film-forming components in footwear material manufacturing and lamination. They are mainly used in sports shoes, casual shoes, leather shoes, outdoor footwear, and functional footwear. The product is typically supplied as a milky white or semi-transparent liquid and can be used as a resin for footwear adhesives, synthetic upper leather, textile upper coatings, upper finishing, and composite-material bonding, providing flexibility, initial tack, peel strength, flex resistance, hydrolysis resistance, abrasion resistance, heat resistance, and low odor.

Major production and consumption regions include China, Vietnam, India, Indonesia, Germany, the United States, Japan, South Korea, and Taiwan. Key applications include upper materials, sole bonding, footwear material lamination, synthetic leather uppers, textile upper coatings, sports shoe component bonding, and environmentally oriented footwear adhesives. The recommended report scope includes waterborne polyurethane dispersions used in footwear adhesives, synthetic uppers, footwear coatings, and lamination processes, while excluding polyurethane hot-melt adhesives, solvent-based PU adhesives, TPU pellets, EVA foam materials, finished footwear, and non-footwear applications.

In 2025, global production of polyurethane dispersions for footwear materials reached approximately 130,000 to 155,000 tons, with mainstream FOB prices ranging from USD

2.65 to USD 3.45 per kg. General footwear lamination adhesives and standard upper coating grades were generally priced toward the lower end, while high-hydrolysis-resistance, high-peel-strength, heat-activated, high-elasticity sports shoe bonding, low-odor, and high-flex-resistance formulations were positioned near the upper end. From 2026 to 2032, waterborne substitution in footwear manufacturing, upgrading demand for sports and athleisure shoes, stricter green supply-chain requirements from brands, and technical transformation of the Asian footwear materials supply chain are expected to support steady demand growth for polyurethane dispersions for footwear materials.

The global market for polyurethane dispersions for footwear materials is shifting from environmental substitution toward higher-performance footwear material solutions. In earlier stages, the core value of waterborne PUD in footwear was mainly to replace selected solvent-based PU adhesives and high-solvent upper treatment systems, reducing organic solvent emissions, improving factory working conditions, and meeting brand requirements for restricted substances and odor control. As sports, athleisure, outdoor, and functional footwear markets continue to expand, end-user requirements have moved beyond bonding strength alone to flex resistance, hydrolysis resistance, humidity resistance, soft touch, lightweighting, abrasion resistance, low odor, and compatibility with multiple substrates. Synthetic upper leather, textile upper coatings, sole bonding, insole lamination, and sports shoe component assembly are expected to keep expanding the application boundary of waterborne polyurethane dispersions.

The main challenges come from cost sensitivity, process conversion, and performance balancing in premium applications. The footwear supply chain is highly focused on cost, lead time, and batch stability, while some low-to-mid-end manufacturers still rely on solvent-based adhesives, EVA emulsions, or other lower-cost systems. Waterborne PUD requires strong formulation and process support in drying speed, open time, heat-activation window, low-temperature bonding, sweat resistance, and hydrolysis resistance. Price volatility in isocyanates, polyols, chain extenders, crosslinkers, and functional additives can also affect producer margins. Over the long term, however, global footwear brands are increasing requirements for low-carbon materials, green factories, and supply-chain compliance, while waterborne conversion in major footwear manufacturing bases such as China, Vietnam, India, and Indonesia is expected to continue. This will drive polyurethane dispersions for footwear materials toward faster drying, higher solid content, stronger bonding, lower odor, and greater customization.

LP Information, Inc. (LPI) ' newest research report, the "Polyurethane Dispersions for Footwear Materials Industry Forecast" looks at past sales and reviews total world Polyurethane Dispersions for Footwear Materials sales in 2025, providing a

comprehensive analysis by region and market sector of projected Polyurethane Dispersions for Footwear Materials sales for 2026 through 2032. With Polyurethane Dispersions for Footwear Materials 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 Footwear Materials industry.

This Insight Report provides a comprehensive analysis of the global Polyurethane Dispersions for Footwear Materials 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 Footwear Materials 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 Footwear Materials market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Polyurethane Dispersions for Footwear Materials 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 Footwear Materials.

This report presents a comprehensive overview, market shares, and growth opportunities of Polyurethane Dispersions for Footwear Materials 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 Adhesives

Synthetic Upper Materials

Textile Upper Coatings

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

Wanhua Chemical Group Co., Ltd.

BASF SE

Lubrizol Corporation

H.B. Fuller Company

Hauthaway Corporation

Chase Corporation

SIWO US Inc.

UBE Corporation

DIC Corporation

Mitsui Chemicals, Inc.

Dainichiseika Color and Chemicals Mfg. Co., Ltd.

Sanyo Chemical Industries, Ltd.

Alberdingk Boley GmbH

Lamberti S.p.A.

PURIN Polyurethane

Dongsung Chemical Co., Ltd.

Susan Materials Co., Ltd.

Nan Pao Resins Chemical Co., Ltd.

Great Eastern Resins Industrial Co., Ltd.

Taiwan PU Corporation

Shanghai Huide Science and Technology Co., Ltd.

Anhui Sinograce Chemical Co., Ltd.

Anhui Anda Huatai New Materials Co., Ltd.

Hemanjali Polymers Pvt. Ltd.

Key Questions Addressed in this Report

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

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

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

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

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

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