

Global PU Associative Thickener Market Growth 2026-2032

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Abstracts

The global PU Associative Thickener market size is predicted to grow from US\$ 1111 million in 2025 to US\$ 1918 million in 2032; it is expected to grow at a CAGR of 8.1% from 2026 to 2032.

Polyurethane associative thickeners are nonionic synthetic rheology additives mainly composed of hydrophilic polyether or polyurethane segments with a small amount of hydrophobic end groups or side groups. They are commonly referred to as HEUR or PU thickeners. In waterborne coatings, inks, adhesives, and similar systems, they form reversible associative networks through interactions between hydrophobic groups and emulsion particles, pigments/fillers, and other hydrophobic components, increasing low-, medium-, or high-shear viscosity while improving leveling, sag resistance, film formation, brush feel, and anti-spattering performance. The product's gross margin is approximately 35%.

Demand for polyurethane associative thickeners is primarily driven by rheology upgrades in waterborne coating systems, especially architectural coatings, industrial coatings, wood coatings, and waterborne inks. Compared with traditional cellulose ethers and ASE/HASE thickeners, HEUR/PU associative thickeners are better suited to improving medium- and high-shear viscosity, leveling, gloss, brush feel, anti-spattering, and film fullness, giving them strong formulation value in mid- to high-end waterborne coatings. Buyers usually do not select products based only on price, but focus on target shear range, thickening efficiency, emulsion compatibility, active content, VOC/APEO/organotin status, and storage stability. Growth is mainly driven by three factors: continued global replacement of solvent-based systems by waterborne and low-VOC coatings; expanding architectural and industrial coating capacity in Asia, which increases mid-range product consumption; and rising demand in Europe and North

America for low-odor, APEO-free, organotin-free, and high-performance rheology additives, driving the product structure toward higher-priced grades. From a competitive perspective, this product belongs to an additive category with higher formulation-technology barriers than ordinary chemicals. Leading companies maintain relatively high margins through emulsion system compatibility expertise, application test data, and customer formulation lock-in. Short-term risks mainly include cyclical fluctuations in architectural coatings, changes in raw material costs such as polyethers and isocyanates, and substitution by HASE, HMPE, or inorganic rheology additives in low-end applications. However, polyurethane associative thickeners will still maintain strong growth potential in high-gloss, low-VOC, waterborne industrial coatings and high-application-performance architectural coatings.

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

This Insight Report provides a comprehensive analysis of the global PU Associative Thickener 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 PU Associative Thickener portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global PU Associative Thickener market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PU Associative Thickener 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 PU Associative Thickener.

This report presents a comprehensive overview, market shares, and growth opportunities of PU Associative Thickener market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Low-Shear Thickener

Mid-Shear Thickener

High-Shear Thickener

Low-To-Mid Shear Thickener

Mid-To-High Shear Thickener

Broad-Spectrum Thickener

Segmentation by Rheology Profile:

Newtonian

Slightly Pseudoplastic

Strongly Pseudoplastic

Thixotropic

Balanced Flow-and-Sag Control

Segmentation by Formulation Compatibility:

Hydrophobic Latex Compatible

Acrylic Emulsion Compatible

Styrene-Acrylic Emulsion Compatible

Polyurethane Dispersion Compatible

Alkyd Emulsion Compatible

High-Pigment/PVC Compatible

Segmentation by Application:

Coatings

Waterborne Inks

Adhesives

Sealants

Construction Chemicals

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.

Dow

BASF

Arkema

Elementis

Evonik

BYK

M?nzing

Milliken

Allnex

Lamberti

San Nopco

Tianjin Ruike Chemical

Anhui Sinograce Chemical

SIO New Material

Key Questions Addressed in this Report

What is the 10-year outlook for the global PU Associative Thickener market?

What factors are driving PU Associative Thickener market growth, globally and by region?

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

How do PU Associative Thickener market opportunities vary by end market size?

How does PU Associative Thickener break out by Type, by Application?

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