

Superabsorbent Polymer Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

Superabsorbent Polymer Market Summary

Global Market Overview and Strategic Outlook

The global Superabsorbent Polymer (SAP) market represents a critical segment within the specialty petrochemical and hygiene material industries. Superabsorbent polymers are functional macromolecules based on polyacrylic acid?specifically cross-linked sodium polyacrylate (CAS No. 9003-04-7)?capable of absorbing and retaining extremely large amounts of liquid relative to their own mass. This unique hydrophilic property makes SAP the functional core of the modern disposable hygiene industry.

The market has entered a phase of maturity and restructuring. Following decades of rapid expansion driven by the adoption of disposable diapers in developing economies, the industry is now navigating a complex landscape defined by demographic shifts and capacity rationalization. Based on current industrial analysis and supply-demand modeling, the estimated global market size for Superabsorbent Polymers is projected to range between 4.2 billion and 7.2 billion USD by 2026.

Looking forward to the medium-to-long term, the industry is expected to witness a period of low-to-moderate growth. The Compound Annual Growth Rate (CAGR) is estimated between 1.3% and 2.6% through the year 2031. This conservative growth forecast reflects the counterbalancing forces of declining birth rates in major economies (China, Japan, Europe) against the rising demand for adult incontinence products and the increasing penetration of hygiene products in emerging markets such as Southeast Asia, Africa, and India.

Product Characteristics and Production Technology

Chemical Profile:

Superabsorbent Polymers are lightly cross-linked hydrophilic polymers. The primary chemical structure is Sodium Polyacrylate. The mechanism of absorption is driven by osmotic pressure; water is drawn into the polymer network to dilute the concentration of sodium ions, causing the polymer chains to uncoil and the network to swell, forming a stable hydrogel.

Key Properties: The defining metrics for SAP performance include Centrifuge Retention Capacity (CRC) (how much liquid it holds under pressure), Absorption Under Load (AUL) (ability to swell while compressed, crucial for diapers), and Absorption Speed.

Production Process:

The manufacturing of SAP is a downstream process of the propylene value chain, heavily dependent on the supply of high-purity Glacial Acrylic Acid (GAA).

1. **Feedstock Preparation:** Crude acrylic acid is refined into Glacial Acrylic Acid (GAA).
2. **Neutralization:** GAA is partially neutralized with sodium hydroxide (caustic soda) to form an aqueous solution of sodium acrylate.
3. **Polymerization:** Cross-linking agents and initiators are added. The solution undergoes polymerization in a reactor to form a gel.
4. **Finishing:** The gel is chopped, dried to remove moisture, and ground into granular or powder form. Surface cross-linking is often applied in the final stage to improve the gel strength and liquid permeability (Anti-Caking).

Product Forms:

SAP is typically produced and sold as white granular powder. The particle size distribution is strictly controlled to ensure optimal performance in the absorbent cores of

hygiene products.

Global Capacity and Competitive Landscape

As of 2025, the global total production capacity for Superabsorbent Polymers has exceeded 4.1 million tons. The supply side is highly concentrated among a 'Big 5' of multinational giants, although the competitive dynamic is shifting due to overcapacity and the rise of Chinese producers.

Tier 1: The Global Giants (The 'Big 5')

The top five producers each hold capacities exceeding 500,000 tons, collectively dominating the global supply chain with advanced technology and global logistics networks.

Nippon Shokubai (Japan): The undisputed global leader in SAP production. With a total capacity breaking through 700,000 tons, Nippon Shokubai sets the industry standard for quality and technological innovation.

BASF (Germany): A close competitor with a massive global footprint. BASF leverages its 'Verbund' integration, producing its own acrylic acid feedstock, which provides resilience against raw material price volatility.

Stockhausen (Europe/Global): Representing the deep heritage of German chemical engineering in this sector, Stockhausen remains a top-tier player with significant capacity in Europe and North America.

Sumitomo Seika (Japan): Renowned for producing high-performance SAP grades often used in premium thin diapers.

LG Chem (South Korea): A major integrated player that has aggressively expanded its acrylics and SAP business to serve the Asian and global markets.

Industry Consolidation and Restructuring:

The market is currently grappling with significant overcapacity. This pressure has forced major restructuring initiatives. A defining event in this trend occurred in 2024, when Sanyo Chemical, historically the world's sixth-largest producer, executed a strategic exit

from the SAP business. Sanyo Chemical closed its production facilities in Malaysia and Japan and divested its Chinese production plant to Nantong Jiangtian Chemical Co. Ltd. This move underscores the intense margin pressure facing non-integrated or less competitive players in the current market environment.

Tier 2: The Rising Contenders

Below the top tier, a group of aggressive producers, primarily based in China, holds capacities ranging between 100,000 and 300,000 tons. These players are increasingly competitive in the mid-range market.

Satellite Chemical Co. Ltd.: A vertically integrated powerhouse. By owning the entire chain from Propane Dehydrogenation (PDH) to Acrylic Acid to SAP, Satellite Chemical has one of the lowest cost structures in the industry.

Yixing Danson Technology Co. Ltd.: A long-standing Chinese producer with a strong export presence.

Nantong Jiangtian Chemical Co. Ltd.: Recently bolstered by the acquisition of Sanyo Chemical's Chinese assets.

Shandong Nuor Biological Technology Co. Ltd.: A growing player expanding its footprint in the domestic market.

Tier 3: Niche and Regional Players

Companies with capacities under 100,000 tons serve specific local markets or niche applications. This includes Formosa Plastics Corp., Wanhua Chemical Group, Banglida (Fujian) New Materials, Jiangsu Sailboat Petrochemical, Tianjin Bohai Chemical, and Shanghai Huayi Group.

Regional Market Analysis

The global geography of SAP production is heavily skewed towards Asia, while consumption patterns are diverging between the aging West and the growing Global South.

Asia-Pacific (APAC)

dominance: APAC is unequivocally the world's largest production and consumption region.

China: China is the world's largest single-country producer. In 2025, China's SAP capacity stands at approximately 1.2 million tons. Notably, capacity growth has plateaued, showing little change from the 1.2 million tons recorded in 2020, reflecting the domestic oversupply. However, slight growth is projected, with an additional 100,000 tons expected by 2026.

South Korea: The second-largest producer in APAC with a robust capacity exceeding 630,000 tons, driven largely by LG Chem's export-oriented strategy.

Japan: The technological heart of the industry and the third-largest producer in the region with 570,000 tons of capacity. Japan focuses on high-value, premium SAP for thin, comfortable diapers.

Other Hubs: Thailand, Indonesia, Taiwan, China, and Singapore possess smaller production capabilities to support regional hygiene product manufacturing.

Europe

Position: The second-largest production and consumption region.

Key Players: The market is controlled by BASF, Stockhausen, Nippon Shokubai, and Sumitomo Seika.

Dynamics: A mature market with high penetration of adult incontinence products. European producers are leaders in sustainability, pioneering 'bio-balanced' SAP derived from renewable feedstocks to meet EU environmental regulations.

North America

Position: The third-largest region.

Key Players: BASF, Stockhausen, and Nippon Shokubai operate major facilities here, primarily in the US Gulf Coast region to access acrylic acid supply.

Dynamics: Demand is stable, with a heavy focus on product innovation (thinner cores, odor control).

Middle East and Africa (MEA)

Highlights: Tasnee operates a significant SAP facility in Saudi Arabia. This region is viewed as a high-growth frontier for consumption due to high birth rates and rapid urbanization.

South America

Highlights: BASF operates a key production facility in Brazil. The region serves as a growing market for feminine hygiene and economy-tier diapers.

Application and End-Use Analysis

The SAP market is almost entirely defined by the personal hygiene industry, though niche applications offer diversification.

Baby Diapers (The Dominant Sector)

Share: Diapers constitute approximately 70% of global SAP consumption.

Trend - Developed Markets & China: Demand is 'soft' and facing structural headwinds. The fertility rates in China, Japan, South Korea, Europe, and North America have dropped to historic lows. This demographic shift has led to a stagnation or decline in the volume of baby diapers sold in these regions.

Trend - Emerging Markets: The growth engine has shifted to Southeast Asia (Indonesia, Vietnam, Philippines), South Asia (India), and the MEA region. In these areas, rising disposable incomes are driving the conversion from cloth to disposable diapers, supported by the relocation of global manufacturing supply chains to these high-growth zones.

Adult Incontinence Products (The Growth Engine)

Drivers: This is the second-largest and fastest-growing application segment.

Demographics: The rapid aging of populations in developed nations and China (the 'Silver Economy') is driving robust demand for adult diapers and incontinence pads.

Technology: Unlike baby diapers, adult products require SAP with higher retention capacities and superior odor control capabilities to ensure dignity and comfort for users.

Feminine Hygiene Products

Drivers: The third-largest sector. Growth is driven by the increasing penetration rate of sanitary napkins and pantyliners in developing countries, where modernization and female workforce participation are rising.

Requirements: These products require fine-granule SAP that allows for ultra-thin product designs without compromising absorption.

Non-Hygiene Applications (Niche)

Agriculture: SAP is used as a water retention agent in soil (hydrogels) to improve crop yield in arid regions.

Food Packaging: Used in absorbent pads for fresh meat and poultry to absorb excess fluids and maintain freshness.

Industrial/Household: Applications include cable blocking tapes (waterproofing underwater cables), disposable heating packs, and controlled-release fragrance carriers.

Value Chain and Supply Chain Analysis

Upstream Integration:

The profitability of SAP production is inextricably linked to the Acrylic Acid market. Since SAP is essentially polymerized acrylic acid, raw material costs constitute a massive portion of the total production cost.

Integrated vs. Non-Integrated: Companies like BASF, LG Chem, and Satellite Chemical that produce their own Propylene and Acrylic Acid have a significant competitive advantage. They can absorb upstream margin volatility. Non-integrated players (who must buy Glacial Acrylic Acid on the merchant market) face severe margin compression when oil prices rise or when acrylic acid supply tightens.

Downstream Power Dynamics:

The customers for SAP are massive global FMCG corporations like Procter & Gamble (Pampers), Kimberly-Clark (Huggies), and Unicharm. These buyers possess immense bargaining power and demand rigorous qualification processes. This creates a high barrier to entry for new SAP suppliers, as changing a raw material in a diaper line requires extensive safety and performance testing.

Opportunities and Challenges

Opportunities:

The 'Silver Wave': The aging global population is a certainty. Manufacturers who pivot their R&D towards high-performance SAP for adult incontinence (focusing on skin health, odor control, and discretion) will capture the highest value growth.

Emerging Market Penetration: India and Africa remain under-penetrated markets. Establishing local production or efficient distribution networks in these regions offers volume growth to offset declines in East Asia.

Sustainability and Bio-SAP: There is increasing pressure to reduce the environmental impact of disposable hygiene products. Developing bio-based SAP (using bio-acrylic acid) or biodegradable alternatives represents a premium market niche, although technical challenges in performance remain.

Challenges:

The Demographic Cliff: The precipitous drop in birth rates in China (the world's largest volume market) is a fundamental threat. The industry must adjust to a

reality where global baby diaper volume may have peaked.

Severe Overcapacity: With global capacity at 4.1 million tons and demand lagging, utilization rates are low. This environment fuels price wars, commoditization, and forces consolidation (as seen with Sanyo Chemical).

Raw Material Volatility: Dependence on propylene/crude oil exposes the industry to energy price shocks.

Environmental Scrutiny: Disposable diapers are a major contributor to landfill waste. While SAP itself is non-toxic, it is a synthetic plastic that does not readily biodegrade. Regulatory pressure to manage diaper waste could impact the long-term viability of traditional SAP materials.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Superabsorbent Polymer Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Superabsorbent Polymer by Region
- 8.2 Import of Superabsorbent Polymer by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST SUPERABSORBENT POLYMER MARKET IN NORTH AMERICA (2021-2031)

- 9.1 Superabsorbent Polymer Market Size
- 9.2 Superabsorbent Polymer Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST SUPERABSORBENT POLYMER MARKET IN SOUTH AMERICA (2021-2031)

- 10.1 Superabsorbent Polymer Market Size
- 10.2 Superabsorbent Polymer Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST SUPERABSORBENT POLYMER MARKET IN ASIA & PACIFIC (2021-2031)

- 11.1 Superabsorbent Polymer Market Size
- 11.2 Superabsorbent Polymer Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia & New Zealand

CHAPTER 12 HISTORICAL AND FORECAST SUPERABSORBENT POLYMER MARKET IN EUROPE (2021-2031)

- 12.1 Superabsorbent Polymer Market Size
- 12.2 Superabsorbent Polymer Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 North Europe

CHAPTER 13 HISTORICAL AND FORECAST SUPERABSORBENT POLYMER MARKET IN MEA (2021-2031)

- 13.1 Superabsorbent Polymer Market Size
- 13.2 Superabsorbent Polymer Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL SUPERABSORBENT POLYMER MARKET (2021-2026)

- 14.1 Superabsorbent Polymer Market Size
- 14.2 Superabsorbent Polymer Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL SUPERABSORBENT POLYMER MARKET FORECAST (2026-2031)

- 15.1 Superabsorbent Polymer Market Size Forecast
- 15.2 Superabsorbent Polymer Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 BASF
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Superabsorbent Polymer Information
 - 16.1.3 SWOT Analysis of BASF
 - 16.1.4 BASF Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.2 Nippon Shokubai
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Superabsorbent Polymer Information
 - 16.2.3 SWOT Analysis of Nippon Shokubai
 - 16.2.4 Nippon Shokubai Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.3 LG Chem
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Superabsorbent Polymer Information

- 16.3.3 SWOT Analysis of LG Chem
- 16.3.4 LG Chem Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.4 Stockhausen
 - 16.4.1 Company Profile
 - 16.4.2 Main Business and Superabsorbent Polymer Information
 - 16.4.3 SWOT Analysis of Stockhausen
 - 16.4.4 Stockhausen Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.5 Sumitomo Seika
 - 16.5.1 Company Profile
 - 16.5.2 Main Business and Superabsorbent Polymer Information
 - 16.5.3 SWOT Analysis of Sumitomo Seika
 - 16.5.4 Sumitomo Seika Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.6 Formosa Plastics Corp.
 - 16.6.1 Company Profile
 - 16.6.2 Main Business and Superabsorbent Polymer Information
 - 16.6.3 SWOT Analysis of Formosa Plastics Corp.
 - 16.6.4 Formosa Plastics Corp. Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.7 Tasnee
 - 16.7.1 Company Profile
 - 16.7.2 Main Business and Superabsorbent Polymer Information
 - 16.7.3 SWOT Analysis of Tasnee
 - 16.7.4 Tasnee Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.8 Yixing Danson Technology Co. Ltd.
 - 16.8.1 Company Profile
 - 16.8.2 Main Business and Superabsorbent Polymer Information
 - 16.8.3 SWOT Analysis of Yixing Danson Technology Co. Ltd.
 - 16.8.4 Yixing Danson Technology Co. Ltd. Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.9 Satellite Chemical Co. Ltd.
 - 16.9.1 Company Profile
 - 16.9.2 Main Business and Superabsorbent Polymer Information
 - 16.9.3 SWOT Analysis of Satellite Chemical Co. Ltd.
 - 16.9.4 Satellite Chemical Co. Ltd. Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)

16.10 Nantong Jiangtian Chemical Co. Ltd.

16.10.1 Company Profile

16.10.2 Main Business and Superabsorbent Polymer Information

16.10.3 SWOT Analysis of Nantong Jiangtian Chemical Co. Ltd.

16.10.4 Nantong Jiangtian Chemical Co. Ltd. Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)

16.11 Shandong Nuocer Biological Technology Co. Ltd.

16.11.1 Company Profile

16.11.2 Main Business and Superabsorbent Polymer Information

16.11.3 SWOT Analysis of Shandong Nuocer Biological Technology Co. Ltd.

16.11.4 Shandong Nuocer Biological Technology Co. Ltd. Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)

16.12 Banglida (Fujian) New Materials Co. Ltd.

16.12.1 Company Profile

16.12.2 Main Business and Superabsorbent Polymer Information

16.12.3 SWOT Analysis of Banglida (Fujian) New Materials Co. Ltd.

16.12.4 Banglida (Fujian) New Materials Co. Ltd. Superabsorbent Polymer Sales, Revenue, Price and Gross Margin (2021-2026)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List

Table Research Scope of Superabsorbent Polymer Report

Table Data Sources of Superabsorbent Polymer Report

Table Major Assumptions of Superabsorbent Polymer Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Superabsorbent Polymer Picture

Table Superabsorbent Polymer Classification

Table Superabsorbent Polymer Applications List

Table Drivers of Superabsorbent Polymer Market

Table Restraints of Superabsorbent Polymer Market

Table Opportunities of Superabsorbent Polymer Market

Table Threats of Superabsorbent Polymer Market

Table Raw Materials Suppliers List

Table Different Production Methods of Superabsorbent Polymer

Table Cost Structure Analysis of Superabsorbent Polymer

Table Key End Users List

Table Latest News of Superabsorbent Polymer Market

Table Merger and Acquisition List

Table Planned/Future Project of Superabsorbent Polymer Market

Table Policy of Superabsorbent Polymer Market

Table 2021-2031 Regional Export of Superabsorbent Polymer

Table 2021-2031 Regional Import of Superabsorbent Polymer

Table 2021-2031 Regional Trade Balance

Figure 2021-2031 Regional Trade Balance

Table 2021-2031 North America Superabsorbent Polymer Market Size and Market Volume List

Figure 2021-2031 North America Superabsorbent Polymer Market Size and CAGR

Figure 2021-2031 North America Superabsorbent Polymer Market Volume and CAGR

Table 2021-2031 North America Superabsorbent Polymer Demand List by Application

Table 2021-2026 North America Superabsorbent Polymer Key Players Sales List

Table 2021-2026 North America Superabsorbent Polymer Key Players Market Share List

Table 2021-2031 North America Superabsorbent Polymer Demand List by Type

Table 2021-2026 North America Superabsorbent Polymer Price List by Type

Table 2021-2031 United States Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 United States Superabsorbent Polymer Import & Export List

Table 2021-2031 Canada Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 Canada Superabsorbent Polymer Import & Export List

Table 2021-2031 Mexico Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 Mexico Superabsorbent Polymer Import & Export List

Table 2021-2031 South America Superabsorbent Polymer Market Size and Market Volume List

Figure 2021-2031 South America Superabsorbent Polymer Market Size and CAGR

Figure 2021-2031 South America Superabsorbent Polymer Market Volume and CAGR

Table 2021-2031 South America Superabsorbent Polymer Demand List by Application

Table 2021-2026 South America Superabsorbent Polymer Key Players Sales List

Table 2021-2026 South America Superabsorbent Polymer Key Players Market Share List

Table 2021-2031 South America Superabsorbent Polymer Demand List by Type

Table 2021-2026 South America Superabsorbent Polymer Price List by Type

Table 2021-2031 Brazil Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 Brazil Superabsorbent Polymer Import & Export List

Table 2021-2031 Argentina Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 Argentina Superabsorbent Polymer Import & Export List

Table 2021-2031 Chile Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 Chile Superabsorbent Polymer Import & Export List

Table 2021-2031 Peru Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 Peru Superabsorbent Polymer Import & Export List

Table 2021-2031 Asia & Pacific Superabsorbent Polymer Market Size and Market Volume List

Figure 2021-2031 Asia & Pacific Superabsorbent Polymer Market Size and CAGR

Figure 2021-2031 Asia & Pacific Superabsorbent Polymer Market Volume and CAGR

Table 2021-2031 Asia & Pacific Superabsorbent Polymer Demand List by Application

Table 2021-2026 Asia & Pacific Superabsorbent Polymer Key Players Sales List

Table 2021-2026 Asia & Pacific Superabsorbent Polymer Key Players Market Share List

Table 2021-2031 Asia & Pacific Superabsorbent Polymer Demand List by Type

Table 2021-2026 Asia & Pacific Superabsorbent Polymer Price List by Type

Table 2021-2031 China Superabsorbent Polymer Market Size and Market Volume List

Table 2021-2031 China Superabsorbent Polymer Import & Export List

Table 2021-2031 India Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 India Superabsorbent Polymer Import & Export List
Table 2021-2031 Japan Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 Japan Superabsorbent Polymer Import & Export List
Table 2021-2031 South Korea Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 South Korea Superabsorbent Polymer Import & Export List
Table 2021-2031 Southeast Asia Superabsorbent Polymer Market Size List
Table 2021-2031 Southeast Asia Superabsorbent Polymer Market Volume List
Table 2021-2031 Southeast Asia Superabsorbent Polymer Import List
Table 2021-2031 Southeast Asia Superabsorbent Polymer Export List
Table 2021-2031 Australia & New Zealand Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 Australia & New Zealand Superabsorbent Polymer Import & Export List
Table 2021-2031 Europe Superabsorbent Polymer Market Size and Market Volume List
Figure 2021-2031 Europe Superabsorbent Polymer Market Size and CAGR
Figure 2021-2031 Europe Superabsorbent Polymer Market Volume and CAGR
Table 2021-2031 Europe Superabsorbent Polymer Demand List by Application
Table 2021-2026 Europe Superabsorbent Polymer Key Players Sales List
Table 2021-2026 Europe Superabsorbent Polymer Key Players Market Share List
Table 2021-2031 Europe Superabsorbent Polymer Demand List by Type
Table 2021-2026 Europe Superabsorbent Polymer Price List by Type
Table 2021-2031 Germany Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 Germany Superabsorbent Polymer Import & Export List
Table 2021-2031 France Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 France Superabsorbent Polymer Import & Export List
Table 2021-2031 United Kingdom Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 United Kingdom Superabsorbent Polymer Import & Export List
Table 2021-2031 Italy Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 Italy Superabsorbent Polymer Import & Export List
Table 2021-2031 Spain Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 Spain Superabsorbent Polymer Import & Export List
Table 2021-2031 Belgium Superabsorbent Polymer Market Size and Market Volume List
Table 2021-2031 Belgium Superabsorbent Polymer Import & Export List
Table 2021-2031 Netherlands Superabsorbent Polymer Market Size and Market

Volume List

- Table 2021-2031 Netherlands Superabsorbent Polymer Import & Export List
- Table 2021-2031 Austria Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 Austria Superabsorbent Polymer Import & Export List
- Table 2021-2031 Poland Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 Poland Superabsorbent Polymer Import & Export List
- Table 2021-2031 North Europe Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 North Europe Superabsorbent Polymer Import & Export List
- Table 2021-2031 MEA Superabsorbent Polymer Market Size and Market Volume List
- Figure 2021-2031 MEA Superabsorbent Polymer Market Size and CAGR
- Figure 2021-2031 MEA Superabsorbent Polymer Market Volume and CAGR
- Table 2021-2031 MEA Superabsorbent Polymer Demand List by Application
- Table 2021-2026 MEA Superabsorbent Polymer Key Players Sales List
- Table 2021-2026 MEA Superabsorbent Polymer Key Players Market Share List
- Table 2021-2031 MEA Superabsorbent Polymer Demand List by Type
- Table 2021-2026 MEA Superabsorbent Polymer Price List by Type
- Table 2021-2031 Egypt Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 Egypt Superabsorbent Polymer Import & Export List
- Table 2021-2031 Israel Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 Israel Superabsorbent Polymer Import & Export List
- Table 2021-2031 South Africa Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 South Africa Superabsorbent Polymer Import & Export List
- Table 2021-2031 Gulf Cooperation Council Countries Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 Gulf Cooperation Council Countries Superabsorbent Polymer Import & Export List
- Table 2021-2031 Turkey Superabsorbent Polymer Market Size and Market Volume List
- Table 2021-2031 Turkey Superabsorbent Polymer Import & Export List
- Table 2021-2026 Global Superabsorbent Polymer Market Size List by Region
- Table 2021-2026 Global Superabsorbent Polymer Market Size Share List by Region
- Table 2021-2026 Global Superabsorbent Polymer Market Volume List by Region
- Table 2021-2026 Global Superabsorbent Polymer Market Volume Share List by Region
- Table 2021-2026 Global Superabsorbent Polymer Demand List by Application
- Table 2021-2026 Global Superabsorbent Polymer Demand Market Share List by Application
- Table 2021-2026 Global Superabsorbent Polymer Capacity List
- Table 2021-2026 Global Superabsorbent Polymer Key Vendors Capacity Share List

Table 2021-2026 Global Superabsorbent Polymer Key Vendors Production List
Table 2021-2026 Global Superabsorbent Polymer Key Vendors Production Share List
Figure 2021-2026 Global Superabsorbent Polymer Capacity Production and Growth Rate
Table 2021-2026 Global Superabsorbent Polymer Key Vendors Production Value List
Figure 2021-2026 Global Superabsorbent Polymer Production Value and Growth Rate
Table 2021-2026 Global Superabsorbent Polymer Key Vendors Production Value Share List
Table 2021-2026 Global Superabsorbent Polymer Demand List by Type
Table 2021-2026 Global Superabsorbent Polymer Demand Market Share List by Type
Table 2021-2026 Regional Superabsorbent Polymer Price List
Table 2026-2031 Global Superabsorbent Polymer Market Size List by Region
Table 2026-2031 Global Superabsorbent Polymer Market Size Share List by Region
Table 2026-2031 Global Superabsorbent Polymer Market Volume List by Region
Table 2026-2031 Global Superabsorbent Polymer Market Volume Share List by Region
Table 2026-2031 Global Superabsorbent Polymer Demand List by Application
Table 2026-2031 Global Superabsorbent Polymer Demand Market Share List by Application
Table 2026-2031 Global Superabsorbent Polymer Capacity List
Table 2026-2031 Global Superabsorbent Polymer Key Vendors Capacity Share List
Table 2026-2031 Global Superabsorbent Polymer Key Vendors Production List
Table 2026-2031 Global Superabsorbent Polymer Key Vendors Production Share List
Figure 2026-2031 Global Superabsorbent Polymer Capacity Production and Growth Rate
Table 2026-2031 Global Superabsorbent Polymer Key Vendors Production Value List
Figure 2026-2031 Global Superabsorbent Polymer Production Value and Growth Rate
Table 2026-2031 Global Superabsorbent Polymer Key Vendors Production Value Share List
Table 2026-2031 Global Superabsorbent Polymer Demand List by Type
Table 2026-2031 Global Superabsorbent Polymer Demand Market Share List by Type
Table 2026-2031 Superabsorbent Polymer Regional Price List
Table BASF Information
Table SWOT Analysis of BASF
Table 2021-2026 BASF Superabsorbent Polymer Product Capacity Production Price Cost Production Value
Figure 2021-2026 BASF Superabsorbent Polymer Capacity Production and Growth Rate
Figure 2021-2026 BASF Superabsorbent Polymer Market Share
Table Nippon Shokubai Information

Table SWOT Analysis of Nippon Shokubai
Table 2021-2026 Nippon Shokubai Superabsorbent Polymer Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Nippon Shokubai Superabsorbent Polymer Capacity Production and
Growth Rate
Figure 2021-2026 Nippon Shokubai Superabsorbent Polymer Market Share
Table LG Chem Information
Table SWOT Analysis of LG Chem
Table 2021-2026 LG Chem Superabsorbent Polymer Product Capacity Production Price
Cost Production Value
Figure 2021-2026 LG Chem Superabsorbent Polymer Capacity Production and Growth
Rate
Figure 2021-2026 LG Chem Superabsorbent Polymer Market Share
Table Stockhausen Information
Table SWOT Analysis of Stockhausen
Table 2021-2026 Stockhausen Superabsorbent Polymer Product Capacity Production
Price Cost Production Value
Figure 2021-2026 Stockhausen Superabsorbent Polymer Capacity Production and
Growth Rate
Figure 2021-2026 Stockhausen Superabsorbent Polymer Market Share
Table Sumitomo Seika Information
Table SWOT Analysis of Sumitomo Seika
Table 2021-2026 Sumitomo Seika Superabsorbent Polymer Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Sumitomo Seika Superabsorbent Polymer Capacity Production and
Growth Rate
Figure 2021-2026 Sumitomo Seika Superabsorbent Polymer Market Share
Table Formosa Plastics Corp. Information
Table SWOT Analysis of Formosa Plastics Corp.
Table 2021-2026 Formosa Plastics Corp. Superabsorbent Polymer Product Capacity
Production Price Cost Production Value
Figure 2021-2026 Formosa Plastics Corp. Superabsorbent Polymer Capacity
Production and Growth Rate
Figure 2021-2026 Formosa Plastics Corp. Superabsorbent Polymer Market Share
Table Tasnee Information
Table SWOT Analysis of Tasnee
Table 2021-2026 Tasnee Superabsorbent Polymer Product Capacity Production Price
Cost Production Value
Figure 2021-2026 Tasnee Superabsorbent Polymer Capacity Production and Growth

Rate

Figure 2021-2026 Tasnee Superabsorbent Polymer Market Share

Table Yixing Danson Technology Co. Ltd. Information

Table SWOT Analysis of Yixing Danson Technology Co. Ltd.

Table 2021-2026 Yixing Danson Technology Co. Ltd. Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Yixing Danson Technology Co. Ltd. Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Yixing Danson Technology Co. Ltd. Superabsorbent Polymer Market Share

Table Satellite Chemical Co. Ltd. Information

Table SWOT Analysis of Satellite Chemical Co. Ltd.

Table 2021-2026 Satellite Chemical Co. Ltd. Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Satellite Chemical Co. Ltd. Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Satellite Chemical Co. Ltd. Superabsorbent Polymer Market Share

Table Nantong Jiangtian Chemical Co. Ltd. Information

Table SWOT Analysis of Nantong Jiangtian Chemical Co. Ltd.

Table 2021-2026 Nantong Jiangtian Chemical Co. Ltd. Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Nantong Jiangtian Chemical Co. Ltd. Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Nantong Jiangtian Chemical Co. Ltd. Superabsorbent Polymer Market Share

Table Shandong Nuocer Biological Technology Co. Ltd. Information

Table SWOT Analysis of Shandong Nuocer Biological Technology Co. Ltd.

Table 2021-2026 Shandong Nuocer Biological Technology Co. Ltd. Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Shandong Nuocer Biological Technology Co. Ltd. Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Shandong Nuocer Biological Technology Co. Ltd. Superabsorbent Polymer Market Share

Table Banglida (Fujian) New Materials Co. Ltd. Information

Table SWOT Analysis of Banglida (Fujian) New Materials Co. Ltd.

Table 2021-2026 Banglida (Fujian) New Materials Co. Ltd. Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Banglida (Fujian) New Materials Co. Ltd. Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Banglida (Fujian) New Materials Co. Ltd. Superabsorbent Polymer Market Share

Table Jiangsu Sailboat Petrochemical Co Ltd Information

Table SWOT Analysis of Jiangsu Sailboat Petrochemical Co Ltd

Table 2021-2026 Jiangsu Sailboat Petrochemical Co Ltd Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Jiangsu Sailboat Petrochemical Co Ltd Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Jiangsu Sailboat Petrochemical Co Ltd Superabsorbent Polymer Market Share

Table Wanhua Chemical Group Information

Table SWOT Analysis of Wanhua Chemical Group

Table 2021-2026 Wanhua Chemical Group Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Wanhua Chemical Group Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Wanhua Chemical Group Superabsorbent Polymer Market Share

Table Tianjin Bohai Chemical Co. Ltd Information

Table SWOT Analysis of Tianjin Bohai Chemical Co. Ltd

Table 2021-2026 Tianjin Bohai Chemical Co. Ltd Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Tianjin Bohai Chemical Co. Ltd Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Tianjin Bohai Chemical Co. Ltd Superabsorbent Polymer Market Share

Table Shanghai Huayi Group Information

Table SWOT Analysis of Shanghai Huayi Group

Table 2021-2026 Shanghai Huayi Group Superabsorbent Polymer Product Capacity Production Price Cost Production Value

Figure 2021-2026 Shanghai Huayi Group Superabsorbent Polymer Capacity Production and Growth Rate

Figure 2021-2026 Shanghai Huayi Group Superabsorbent Polymer Market Share

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