

Textile Repellent Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Textile Repellent Market Summary

The textile repellent market represents a specialized and evolving segment within the textile chemicals industry. Textile repellents are chemical agents applied to fabrics to impart water, oil, and stain resistance while maintaining comfort and breathability. Their adoption has historically been closely tied to the performance requirements of end-use industries such as sportswear, outdoor gear, technical textiles, and industrial protective clothing. In 2025, the global textile repellent market is estimated to reach between USD 350 million and USD 700 million, with expectations to grow at a compound annual growth rate (CAGR) of 3.8% to 6.8% between 2025 and 2030. The textile repellent industry is undergoing a significant transformation driven by regulatory pressures, sustainability demands, and shifts in consumer preferences. Historically dominated by fluorinated repellents due to their exceptional water and oil resistance, the industry is progressively transitioning toward non-fluorinated and bio-based alternatives in response to environmental concerns and restrictions on per- and polyfluoroalkyl substances (PFAS). This duality — balancing performance with environmental compliance — defines the current trajectory of the market.

Historical Evolution of Textile Repellents

The development of textile repellents has occurred in four major phases:

1. Initial Development (1930s–1950s):

During this period, Europe and the United States modified traditional water repellents,

developing non-fluorinated structures primarily for simple or semi-durable water resistance. However, these formulations lacked oil repellency and provided only limited protection.

2. Rapid Growth (1950s–2000):

With the commercialization of fluorinated repellents, particularly C8-based formulations, textile repellents became integral to high-performance fabrics. The superior combination of water, oil, and stain resistance enabled these repellents to dominate the market for decades.

3. Transition Period (2000–2025):

Growing concerns over PFOS and PFOA led to heightened regulatory scrutiny. From 2016 onward, leading multinational companies phased out C8 fluorochemicals, replacing them with shorter-chain C6-based solutions. Parallel to this, global brands such as Nike and Adidas, through initiatives like the Zero Discharge of Hazardous Chemicals (ZDHC), committed to phasing out hazardous substances, accelerating industry-wide adoption of PFAS-free alternatives.

4. Sustainable Era (2025 and beyond):

The industry is now moving toward fluorine-free repellents. Europe and North America are expected to achieve near-complete fluorine-free adoption after 2025, with China phasing out C8 repellents in the same year and transitioning primarily to C6 substitutes. Increasingly, non-fluorinated solutions — including silicone, acrylic, paraffin, polyurethane, and bio-based repellents — are gaining market share.

Product Types and Trends

The textile repellent market is typically segmented into fluorinated repellents and non-fluorinated repellents.

1. Fluorinated Repellents:

Historically dominated the market due to their superior repellency to both water and oils.

C6-based repellents remain in use, but their higher production cost

(roughly 50% above C8 equivalents) presents adoption challenges.

CAGR outlook (2025–2030): 1.5%–3.0%, reflecting stagnation as regulatory pressures mount.

2. Non-fluorinated Repellents:

Include paraffin, silicone, acrylic, polyurethane, and bio-based formulations.

Acrylic-based repellents are cost-effective and widely used, though they may compromise softness and aesthetics.

Polyurethane formulations are regarded as the most balanced in terms of durability, hand-feel, and water repellency, though they come at higher costs.

Bio-based repellents, such as wax emulsions or bio-based polyurethane blends, are an emerging category that aligns with sustainability objectives. Chemours' Zelan R3 and Rudolf's RUCO-DRY ECO exemplify this trend.

CAGR outlook (2025–2030): 6.0%–9.0%, indicating robust growth as industries shift toward PFAS-free solutions.

Key Application Segments

1. Athletic Wear:

Growing consumer demand for performance apparel drives significant adoption of water- and stain-resistant fabrics.

Repellents in this segment must balance durability, softness, and breathability.

CAGR estimate: 4.5%–7.5%.

2. Winter Garments:

Strong demand in colder regions where weatherproofing is essential.

Consumers increasingly favor eco-friendly repellents in this category, accelerating non-fluorinated adoption.

CAGR estimate: 3.5%–6.0%.

3. Technical Textiles:

Includes uniforms, protective gear, and industrial fabrics requiring high-performance repellency against water, oils, and chemicals.

This segment is less flexible in switching away from fluorinated repellents due to stringent performance needs, though innovation is closing the gap.

CAGR estimate: 4.0%–7.0%.

4. Others (casual wear, home textiles):

Lower technical requirements but high volume consumption.

A significant target for cost-effective acrylic and silicone-based non-fluorinated repellents.

CAGR estimate: 3.0%–5.0%.

Regional Market Trends

North America:

A leading market in terms of regulatory shifts, with early adoption of PFAS-free formulations. Major apparel brands headquartered in this region strongly influence

global supply chains. Growth is expected to be moderate, around 3%–5% CAGR, due to market maturity but underpinned by sustainability-driven innovation.

Europe:

The strictest regulatory environment globally, with rapid transitions to non-fluorinated repellents. Countries such as Germany, France, and the Nordics are at the forefront of green textile chemicals. Expected growth: 4%–6% CAGR, primarily driven by sustainable solutions.

Asia-Pacific:

The largest textile manufacturing hub, led by China, India, Bangladesh, and Vietnam. While cost remains a critical factor, regulatory tightening in China and sustainability demands from Western buyers are accelerating the adoption of eco-friendly repellents. Growth potential is strong, with a 5%–8% CAGR expected between 2025 and 2030.

Latin America and Middle East & Africa:

Smaller but growing markets, with Brazil, Turkey, and South Africa showing gradual adoption trends. Growth is expected in the 3%–5% CAGR range, supported by rising demand for outdoor and sportswear.

Competitive Landscape

The textile repellent market is moderately consolidated, with global chemical companies and specialized textile auxiliaries firms leading innovation.

Dow: A pioneer in silicone-based repellents, with products such as DOWSIL IE-8749 Emulsion tailored for cotton and blends.

Chemours: Known for fluorine-free, bio-based products like Zelan R3, the company positions itself at the forefront of sustainable repellents.

3M: Historically a leader in fluorochemicals, it has reduced its PFAS footprint and emphasizes sustainable alternatives.

Evonik and Wacker Chemie AG: Both companies offer advanced silicone technologies, focusing on soft handle and durability.

Daikin and Shin-Etsu Chemical: Japanese firms that continue to develop fluorine-based solutions while exploring alternatives for specialized applications.

Archroma: Offers paraffin- and resin-based repellents such as Phobotex RSH, balancing performance with cost.

Nicca Chemical: Known for innovative silicone- and acrylic-based repellents, e.g., NEOSEED NR-8800.

RUDOLF GmbH: A strong innovator in sustainable repellents, with eco-labeled products like RUCO-DRY ECO.

Chinese players (Transfar, Dymatic, Fuke New Materials, Beijing CTA Text Chemicals): Rising in prominence with cost-competitive acrylic and polyurethane formulations, increasingly targeting eco-compliance to serve global export markets.

Porter's Five Forces Analysis

1. Threat of New Entrants – Moderate:

While the market requires specialized chemical know-how and regulatory compliance, regional players can enter by developing cost-effective non-fluorinated formulations, especially in Asia.

2. Bargaining Power of Suppliers – Moderate:

Dependence on fluorinated raw materials (particularly C6 fluorochemicals) raises supplier influence. However, diversification into acrylics, silicones, and bio-based feedstocks balances supplier power.

3. Bargaining Power of Buyers – High:

Major global apparel brands exert strong influence through sustainability commitments

(e.g., ZDHC), forcing suppliers to innovate and adjust pricing strategies.

4. Threat of Substitutes – High:

The ongoing shift from fluorinated to non-fluorinated repellents demonstrates strong substitution potential. As bio-based and hybrid technologies mature, traditional fluorochemicals face growing displacement.

5. Industry Rivalry – High:

The market is competitive, with global giants and regional specialists vying for market share. Innovation in eco-friendly solutions and customer relationships with textile mills are key differentiators.

Opportunities and Challenges

Opportunities:

Sustainability Demand: Strong momentum for PFAS-free and bio-based repellents, supported by brand commitments and consumer awareness.

Innovation Potential: Hybrid repellents (e.g., polyurethane-acrylic blends) and nanostructured finishes offer performance enhancements.

Expanding Applications: Beyond apparel, opportunities exist in upholstery, automotive textiles, and medical fabrics where water and stain resistance are valued.

Asia-Pacific Manufacturing Base: Rapid adoption of sustainable technologies by Chinese and Indian firms offers growth potential and global supply chain integration.

Challenges:

Performance Gap: Non-fluorinated repellents still lag behind fluorinated ones in oil repellency and durability, limiting adoption in technical textiles.

Cost Pressure: C6 fluorochemicals and advanced non-fluorinated alternatives

remain expensive, challenging adoption in price-sensitive markets.

Regulatory Complexity: Differing timelines for PFAS restrictions across regions create uncertainty and require adaptive strategies from manufacturers.

Consumer Perception: Balancing eco-friendly claims with consistent fabric performance is essential to maintain brand trust.

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 Textile Repellent 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 Textile Repellent by Region
- 8.2 Import of Textile Repellent by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST TEXTILE REPELLENT MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Textile Repellent Market Size
- 9.2 Textile Repellent 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 TEXTILE REPELLENT MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Textile Repellent Market Size
- 10.2 Textile Repellent 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 TEXTILE REPELLENT MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Textile Repellent Market Size
- 11.2 Textile Repellent 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

CHAPTER 12 HISTORICAL AND FORECAST TEXTILE REPELLENT MARKET IN EUROPE (2020-2030)

- 12.1 Textile Repellent Market Size
- 12.2 Textile Repellent 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 Russia

CHAPTER 13 HISTORICAL AND FORECAST TEXTILE REPELLENT MARKET IN MEA (2020-2030)

- 13.1 Textile Repellent Market Size
- 13.2 Textile Repellent 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 TEXTILE REPELLENT MARKET (2020-2025)

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

CHAPTER 15 GLOBAL TEXTILE REPELLENT MARKET FORECAST (2025-2030)

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

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Dow
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Textile Repellent Information
 - 16.1.3 SWOT Analysis of Dow
 - 16.1.4 Dow Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Chemours
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Textile Repellent Information
 - 16.2.3 SWOT Analysis of Chemours
 - 16.2.4 Chemours Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 3M
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Textile Repellent Information
 - 16.3.3 SWOT Analysis of 3M
 - 16.3.4 3M Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.4 Evonik

16.4.1 Company Profile

16.4.2 Main Business and Textile Repellent Information

16.4.3 SWOT Analysis of Evonik

16.4.4 Evonik Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.5 Wacker Chemie AG

16.5.1 Company Profile

16.5.2 Main Business and Textile Repellent Information

16.5.3 SWOT Analysis of Wacker Chemie AG

16.5.4 Wacker Chemie AG Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.6 Daikin

16.6.1 Company Profile

16.6.2 Main Business and Textile Repellent Information

16.6.3 SWOT Analysis of Daikin

16.6.4 Daikin Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.7 Shin-Etsu Chemical

16.7.1 Company Profile

16.7.2 Main Business and Textile Repellent Information

16.7.3 SWOT Analysis of Shin-Etsu Chemical

16.7.4 Shin-Etsu Chemical Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.8 Archroma

16.8.1 Company Profile

16.8.2 Main Business and Textile Repellent Information

16.8.3 SWOT Analysis of Archroma

16.8.4 Archroma Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.9 Nicca Chemical

16.9.1 Company Profile

16.9.2 Main Business and Textile Repellent Information

16.9.3 SWOT Analysis of Nicca Chemical

16.9.4 Nicca Chemical Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.10 RUDOLF

16.10.1 Company Profile

16.10.2 Main Business and Textile Repellent Information

16.10.3 SWOT Analysis of RUDOLF

16.10.4 RUDOLF Textile Repellent Sales, Revenue, Price and Gross Margin

(2020-2025)

16.11 Transfar Group

16.11.1 Company Profile

16.11.2 Main Business and Textile Repellent Information

16.11.3 SWOT Analysis of Transfar Group

16.11.4 Transfar Group Textile Repellent Sales, Revenue, Price and Gross Margin

(2020-2025)

16.12 Dymatic Chemicals Inc.

16.12.1 Company Profile

16.12.2 Main Business and Textile Repellent Information

16.12.3 SWOT Analysis of Dymatic Chemicals Inc.

16.12.4 Dymatic Chemicals Inc. Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

16.13 Fuke New Materials (Shanghai) Co. Ltd

16.13.1 Company Profile

16.13.2 Main Business and Textile Repellent Information

16.13.3 SWOT Analysis of Fuke New Materials (Shanghai) Co. Ltd

16.13.4 Fuke New Materials (Shanghai) Co. Ltd Textile Repellent Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List
Table Research Scope of Textile Repellent Report
Table Data Sources of Textile Repellent Report
Table Major Assumptions of Textile Repellent Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure Textile Repellent Picture
Table Textile Repellent Classification
Table Textile Repellent Applications List
Table Drivers of Textile Repellent Market
Table Restraints of Textile Repellent Market
Table Opportunities of Textile Repellent Market
Table Threats of Textile Repellent Market
Table Raw Materials Suppliers List
Table Different Production Methods of Textile Repellent
Table Cost Structure Analysis of Textile Repellent
Table Key End Users List
Table Latest News of Textile Repellent Market
Table Merger and Acquisition List
Table Planned/Future Project of Textile Repellent Market
Table Policy of Textile Repellent Market
Table 2020-2030 Regional Export of Textile Repellent
Table 2020-2030 Regional Import of Textile Repellent
Table 2020-2030 Regional Trade Balance
Figure 2020-2030 Regional Trade Balance
Table 2020-2030 North America Textile Repellent Market Size and Market Volume List
Figure 2020-2030 North America Textile Repellent Market Size and CAGR
Figure 2020-2030 North America Textile Repellent Market Volume and CAGR
Table 2020-2030 North America Textile Repellent Demand List by Application
Table 2020-2025 North America Textile Repellent Key Players Sales List
Table 2020-2025 North America Textile Repellent Key Players Market Share List
Table 2020-2030 North America Textile Repellent Demand List by Type
Table 2020-2025 North America Textile Repellent Price List by Type
Table 2020-2030 United States Textile Repellent Market Size and Market Volume List
Table 2020-2030 United States Textile Repellent Import & Export List

Table 2020-2030 Canada Textile Repellent Market Size and Market Volume List
Table 2020-2030 Canada Textile Repellent Import & Export List
Table 2020-2030 Mexico Textile Repellent Market Size and Market Volume List
Table 2020-2030 Mexico Textile Repellent Import & Export List
Table 2020-2030 South America Textile Repellent Market Size and Market Volume List
Figure 2020-2030 South America Textile Repellent Market Size and CAGR
Figure 2020-2030 South America Textile Repellent Market Volume and CAGR
Table 2020-2030 South America Textile Repellent Demand List by Application
Table 2020-2025 South America Textile Repellent Key Players Sales List
Table 2020-2025 South America Textile Repellent Key Players Market Share List
Table 2020-2030 South America Textile Repellent Demand List by Type
Table 2020-2025 South America Textile Repellent Price List by Type
Table 2020-2030 Brazil Textile Repellent Market Size and Market Volume List
Table 2020-2030 Brazil Textile Repellent Import & Export List
Table 2020-2030 Argentina Textile Repellent Market Size and Market Volume List
Table 2020-2030 Argentina Textile Repellent Import & Export List
Table 2020-2030 Chile Textile Repellent Market Size and Market Volume List
Table 2020-2030 Chile Textile Repellent Import & Export List
Table 2020-2030 Peru Textile Repellent Market Size and Market Volume List
Table 2020-2030 Peru Textile Repellent Import & Export List
Table 2020-2030 Asia & Pacific Textile Repellent Market Size and Market Volume List
Figure 2020-2030 Asia & Pacific Textile Repellent Market Size and CAGR
Figure 2020-2030 Asia & Pacific Textile Repellent Market Volume and CAGR
Table 2020-2030 Asia & Pacific Textile Repellent Demand List by Application
Table 2020-2025 Asia & Pacific Textile Repellent Key Players Sales List
Table 2020-2025 Asia & Pacific Textile Repellent Key Players Market Share List
Table 2020-2030 Asia & Pacific Textile Repellent Demand List by Type
Table 2020-2025 Asia & Pacific Textile Repellent Price List by Type
Table 2020-2030 China Textile Repellent Market Size and Market Volume List
Table 2020-2030 China Textile Repellent Import & Export List
Table 2020-2030 India Textile Repellent Market Size and Market Volume List
Table 2020-2030 India Textile Repellent Import & Export List
Table 2020-2030 Japan Textile Repellent Market Size and Market Volume List
Table 2020-2030 Japan Textile Repellent Import & Export List
Table 2020-2030 South Korea Textile Repellent Market Size and Market Volume List
Table 2020-2030 South Korea Textile Repellent Import & Export List
Table 2020-2030 Southeast Asia Textile Repellent Market Size List
Table 2020-2030 Southeast Asia Textile Repellent Market Volume List
Table 2020-2030 Southeast Asia Textile Repellent Import List

Table 2020-2030 Southeast Asia Textile Repellent Export List
Table 2020-2030 Australia Textile Repellent Market Size and Market Volume List
Table 2020-2030 Australia Textile Repellent Import & Export List
Table 2020-2030 Europe Textile Repellent Market Size and Market Volume List
Figure 2020-2030 Europe Textile Repellent Market Size and CAGR
Figure 2020-2030 Europe Textile Repellent Market Volume and CAGR
Table 2020-2030 Europe Textile Repellent Demand List by Application
Table 2020-2025 Europe Textile Repellent Key Players Sales List
Table 2020-2025 Europe Textile Repellent Key Players Market Share List
Table 2020-2030 Europe Textile Repellent Demand List by Type
Table 2020-2025 Europe Textile Repellent Price List by Type
Table 2020-2030 Germany Textile Repellent Market Size and Market Volume List
Table 2020-2030 Germany Textile Repellent Import & Export List
Table 2020-2030 France Textile Repellent Market Size and Market Volume List
Table 2020-2030 France Textile Repellent Import & Export List
Table 2020-2030 United Kingdom Textile Repellent Market Size and Market Volume List
Table 2020-2030 United Kingdom Textile Repellent Import & Export List
Table 2020-2030 Italy Textile Repellent Market Size and Market Volume List
Table 2020-2030 Italy Textile Repellent Import & Export List
Table 2020-2030 Spain Textile Repellent Market Size and Market Volume List
Table 2020-2030 Spain Textile Repellent Import & Export List
Table 2020-2030 Belgium Textile Repellent Market Size and Market Volume List
Table 2020-2030 Belgium Textile Repellent Import & Export List
Table 2020-2030 Netherlands Textile Repellent Market Size and Market Volume List
Table 2020-2030 Netherlands Textile Repellent Import & Export List
Table 2020-2030 Austria Textile Repellent Market Size and Market Volume List
Table 2020-2030 Austria Textile Repellent Import & Export List
Table 2020-2030 Poland Textile Repellent Market Size and Market Volume List
Table 2020-2030 Poland Textile Repellent Import & Export List
Table 2020-2030 Russia Textile Repellent Market Size and Market Volume List
Table 2020-2030 Russia Textile Repellent Import & Export List
Table 2020-2030 MEA Textile Repellent Market Size and Market Volume List
Figure 2020-2030 MEA Textile Repellent Market Size and CAGR
Figure 2020-2030 MEA Textile Repellent Market Volume and CAGR
Table 2020-2030 MEA Textile Repellent Demand List by Application
Table 2020-2025 MEA Textile Repellent Key Players Sales List
Table 2020-2025 MEA Textile Repellent Key Players Market Share List
Table 2020-2030 MEA Textile Repellent Demand List by Type

Table 2020-2025 MEA Textile Repellent Price List by Type
Table 2020-2030 Egypt Textile Repellent Market Size and Market Volume List
Table 2020-2030 Egypt Textile Repellent Import & Export List
Table 2020-2030 Israel Textile Repellent Market Size and Market Volume List
Table 2020-2030 Israel Textile Repellent Import & Export List
Table 2020-2030 South Africa Textile Repellent Market Size and Market Volume List
Table 2020-2030 South Africa Textile Repellent Import & Export List
Table 2020-2030 Gulf Cooperation Council Countries Textile Repellent Market Size and Market Volume List
Table 2020-2030 Gulf Cooperation Council Countries Textile Repellent Import & Export List
Table 2020-2030 Turkey Textile Repellent Market Size and Market Volume List
Table 2020-2030 Turkey Textile Repellent Import & Export List
Table 2020-2025 Global Textile Repellent Market Size List by Region
Table 2020-2025 Global Textile Repellent Market Size Share List by Region
Table 2020-2025 Global Textile Repellent Market Volume List by Region
Table 2020-2025 Global Textile Repellent Market Volume Share List by Region
Table 2020-2025 Global Textile Repellent Demand List by Application
Table 2020-2025 Global Textile Repellent Demand Market Share List by Application
Table 2020-2025 Global Textile Repellent Capacity List
Table 2020-2025 Global Textile Repellent Key Vendors Capacity Share List
Table 2020-2025 Global Textile Repellent Key Vendors Production List
Table 2020-2025 Global Textile Repellent Key Vendors Production Share List
Figure 2020-2025 Global Textile Repellent Capacity Production and Growth Rate
Table 2020-2025 Global Textile Repellent Key Vendors Production Value List
Figure 2020-2025 Global Textile Repellent Production Value and Growth Rate
Table 2020-2025 Global Textile Repellent Key Vendors Production Value Share List
Table 2020-2025 Global Textile Repellent Demand List by Type
Table 2020-2025 Global Textile Repellent Demand Market Share List by Type
Table 2020-2025 Regional Textile Repellent Price List
Table 2025-2030 Global Textile Repellent Market Size List by Region
Table 2025-2030 Global Textile Repellent Market Size Share List by Region
Table 2025-2030 Global Textile Repellent Market Volume List by Region
Table 2025-2030 Global Textile Repellent Market Volume Share List by Region
Table 2025-2030 Global Textile Repellent Demand List by Application
Table 2025-2030 Global Textile Repellent Demand Market Share List by Application
Table 2025-2030 Global Textile Repellent Capacity List
Table 2025-2030 Global Textile Repellent Key Vendors Capacity Share List
Table 2025-2030 Global Textile Repellent Key Vendors Production List

Table 2025-2030 Global Textile Repellent Key Vendors Production Share List

Figure 2025-2030 Global Textile Repellent Capacity Production and Growth Rate

Table 2025-2030 Global Textile Repellent Key Vendors Production Value List

Figure 2025-2030 Global Textile Repellent Production Value and Growth Rate

Table 2025-2030 Global Textile Repellent Key Vendors Production Value Share List

Table 2025-2030 Global Textile Repellent Demand List by Type

Table 2025-2030 Global Textile Repellent Demand Market Share List by Type

Table 2025-2030 Textile Repellent Regional Price List

Table Dow Information

Table SWOT Analysis of Dow

Table 2020-2025 Dow Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 Dow Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Dow Textile Repellent Market Share

Table Chemours Information

Table SWOT Analysis of Chemours

Table 2020-2025 Chemours Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 Chemours Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Chemours Textile Repellent Market Share

Table 3M Information

Table SWOT Analysis of 3M

Table 2020-2025 3M Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 3M Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 3M Textile Repellent Market Share

Table Evonik Information

Table SWOT Analysis of Evonik

Table 2020-2025 Evonik Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 Evonik Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Evonik Textile Repellent Market Share

Table Wacker Chemie AG Information

Table SWOT Analysis of Wacker Chemie AG

Table 2020-2025 Wacker Chemie AG Textile Repellent Product Capacity Production
Price Cost Production Value

Figure 2020-2025 Wacker Chemie AG Textile Repellent Capacity Production and
Growth Rate

Figure 2020-2025 Wacker Chemie AG Textile Repellent Market Share

Table Daikin Information

Table SWOT Analysis of Daikin

Table 2020-2025 Daikin Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 Daikin Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Daikin Textile Repellent Market Share

Table Shin-Etsu Chemical Information

Table SWOT Analysis of Shin-Etsu Chemical

Table 2020-2025 Shin-Etsu Chemical Textile Repellent Product Capacity Production
Price Cost Production Value

Figure 2020-2025 Shin-Etsu Chemical Textile Repellent Capacity Production and
Growth Rate

Figure 2020-2025 Shin-Etsu Chemical Textile Repellent Market Share

Table Archroma Information

Table SWOT Analysis of Archroma

Table 2020-2025 Archroma Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 Archroma Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Archroma Textile Repellent Market Share

Table Nicca Chemical Information

Table SWOT Analysis of Nicca Chemical

Table 2020-2025 Nicca Chemical Textile Repellent Product Capacity Production Price
Cost Production Value

Figure 2020-2025 Nicca Chemical Textile Repellent Capacity Production and Growth
Rate

Figure 2020-2025 Nicca Chemical Textile Repellent Market Share

Table RUDOLF Information

Table SWOT Analysis of RUDOLF

Table 2020-2025 RUDOLF Textile Repellent Product Capacity Production Price Cost
Production Value

Figure 2020-2025 RUDOLF Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 RUDOLF Textile Repellent Market Share

Table Transfar Group Information

Table SWOT Analysis of Transfar Group

Table 2020-2025 Transfar Group Textile Repellent Product Capacity Production Price
Cost Production Value

Figure 2020-2025 Transfar Group Textile Repellent Capacity Production and Growth
Rate

Figure 2020-2025 Transfar Group Textile Repellent Market Share

Table Dymatic Chemicals Inc. Information

Table SWOT Analysis of Dymatic Chemicals Inc.

Table 2020-2025 Dymatic Chemicals Inc. Textile Repellent Product Capacity Production Price Cost Production Value

Figure 2020-2025 Dymatic Chemicals Inc. Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Dymatic Chemicals Inc. Textile Repellent Market Share

Table Fuke New Materials (Shanghai) Co. Ltd Information

Table SWOT Analysis of Fuke New Materials (Shanghai) Co. Ltd

Table 2020-2025 Fuke New Materials (Shanghai) Co. Ltd Textile Repellent Product Capacity Production Price Cost Production Value

Figure 2020-2025 Fuke New Materials (Shanghai) Co. Ltd Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Fuke New Materials (Shanghai) Co. Ltd Textile Repellent Market Share

Table Beijing CTA Tex Chemicals Co. Ltd. Information

Table SWOT Analysis of Beijing CTA Tex Chemicals Co. Ltd.

Table 2020-2025 Beijing CTA Tex Chemicals Co. Ltd. Textile Repellent Product Capacity Production Price Cost Production Value

Figure 2020-2025 Beijing CTA Tex Chemicals Co. Ltd. Textile Repellent Capacity Production and Growth Rate

Figure 2020-2025 Beijing CTA Tex Chemicals Co. Ltd. Textile Repellent Market Share

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