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Polyether Modified Polysiloxane Market Forecasts to 2032 – Global Analysis By Form, Grade, End User (Agriculture, Plastic Processing, Ink and Coatings, Cosmetics and Personal Care, Pulp and Paper, Adhesives and Sealants, Textile and Other End Users) and By Geography

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Abstracts

According to Stratistics MRC, the Global Polyether Modified Polysiloxane Market is accounted for $1.46 billion in 2025 and is expected to reach $2.38 billion by 2032 growing at a CAGR of 7.2% during the forecast period. Polyether-modified polysiloxane is a type of silicone surfactant that combines the unique properties of both polyethers and polysiloxanes. In many formulations, this hybrid structure works incredibly well as a wetting agent, emulsifier, and dispersant due to its exceptional surface activity. Low surface tension, good spreading properties, and thermal stability are provided by the polysiloxane backbone, while the polyether segments improve compatibility with organic and aqueous systems. Consequently, polyether-modified polysiloxanes are widely used in formulation stability, spreadability, and overall product performance in industries like textiles, personal care, coatings, and agriculture.

According to the American Chemical Society (ACS), polyether-modified siloxanes have been widely studied and engineered for surfactant and dispersion roles. For example, a study published in ACS Omega describes how UV-cured polyether?modified polysiloxane–urethane acrylates can exhibit tensile strengths ranging from ~2 to ~20 MPa—highlighting their robust mechanical performance in coatings and adhesives.

Market Dynamics:

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Driver:

Growing need for super-spreaders in agriculture

Agricultural applications have been transformed by polyether-modified polysiloxanes, which function as extremely effective super-spreaders and wetting agents in pesticide and herbicide formulations. Because these surfactants significantly reduce the surface tension of aqueous sprays, active ingredients can disperse uniformly and reach plant surfaces that are difficult to wet, like waxy or hairy leaves. This result in better coverage, lower dosage needs, and enhanced agrochemical uptake—even in harsh environmental circumstances. Such performance-enhancing adjuvants are anticipated to become much more in demand, particularly in nations implementing precision farming techniques, as global agriculture faces mounting pressure to increase productivity while reducing chemical inputs and environmental impact.

Restraint:

Dependency on raw materials and high production costs

The high cost of production, which is mostly caused by the intricate synthesis process and the price volatility of raw materials like siloxane monomers and ethylene oxide/propylene oxide derivatives, is one of the main factors limiting the market for polyether-modified polysiloxane. Sophisticated machinery and strict quality control are necessary for the production process, particularly for applications like electronics or pharmaceuticals that demand high purity and performance standards. Furthermore, changes in the price of crude oil and petrochemical feedstocks, which are the foundation of many PMP components, can have a big impact on manufacturing costs.

Opportunity:

Innovation in cosmetics and personal care

Innovative, functional ingredients that meet clean-label standards and provide superior sensory experiences are still in high demand in the personal care sector. PMPs are useful in skin care, hair care, and sun protection products because they provide a special balance of performance and compatibility with formulations that are both water%-%and oil-based. In the burgeoning cosmeceuticals industry, where products blend cosmetic appeal with dermatological benefits, their capacity to form breathable, non-greasy films and function as emulsifiers and conditioning agents offers exciting

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opportunities. The demand for PMP surfactants that improve spread ability, feel, and product stability will be further supported by the rising popularity of multipurpose, hybrid products like BB creams, tinted moisturizers, and anti-aging serums.

Threat:

Competition from new bio-based and green surfactants

Traditional PMP-based formulations are facing an increasing competitive threat from the rise of bio-based and green surfactants, which are made from renewable resources like plant oils, sugars, and amino acids. Because of their low toxicity, biodegradability, and regulatory compliance, these substitutes are being used more and more in textile, home care, personal care, and agricultural applications. Moreover, biotechnology advancements such as enzymatically modified natural polymers and fermentation-derived biosurfactants are making it possible for environmentally friendly substitutes to perform on par with or better than traditional silicone-based surfactants.

Covid-19 Impact:

The COVID-19 pandemic affected the market for polyether modified polysiloxane (PMP) in a variety of ways. The market was disrupted in the early stages of the outbreak by labor shortages, global supply chain disruptions, and decreased industrial activity, which primarily affected important end-use sectors like electronics, construction, and the automotive industry. But as consumers' attention turned more to cleanliness and self-care, demand soared in areas like personal care and hygiene products, where PMPs are used as conditioners and emulsifiers. Furthermore, the demand for PMP-based adjuvants remained steady in the agricultural sector because of their essential nature. Interest in high-performance, low-VOC PMP formulations increased over time as economies started to recover and green, sustainable manufacturing gained traction, setting up the market for long-term growth despite temporary setbacks.

The agriculture segment is expected to be the largest during the forecast period

The agriculture segment is expected to account for the largest market share during the forecast period, motivated by its vital function in improving agrochemical formulations' efficiency. Because PMP compounds can dramatically lower surface tension and increase coverage on plant surfaces, they are frequently used as super-spreaders and wetting agents in pesticides, herbicides, and foliar fertilizers. By ensuring improved active ingredient penetration and absorption, this raises crop yields while using less

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chemical input. Moreover, the demand for PMP-based agricultural adjuvants is increasing as precision and sustainable farming methods gain traction worldwide, particularly in high-growth regions like Asia-Pacific and Latin America.

The ink & coatings segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the ink & coatings segment is predicted to witness the highest growth rate. The growing need for high-performance, low-VOC waterborne paints and coatings in industrial, architectural, and automotive applications is driving this quick expansion. Important formulation characteristics like flow, leveling, defoaming, and anti-cratering are improved by polyether-modified polysiloxanes, which also guarantee outstanding compatibility with a range of resin systems. Additionally, formulators are using PMP-based additives to satisfy strict performance and regulatory requirements as end users seek long-lasting, eco-friendly finishes. As a result, SMPs are being widely used in coatings and ink applications worldwide.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, driven by nations like China, India, and Japan's booming end-use sectors, agricultural intensification, and fast industrialization. Strong demand from the construction, textile, and agricultural sectors—where PMPs are extensively utilized as surfactants, leveling agents, and super-spreaders—supports the region's dominance. Asia-Pacific's position in the world market is further reinforced by China's substantial role as a producer and consumer of PMP-based products. Furthermore, the region's growth is also aided by supportive government regulations, rising awareness of sustainable farming methods, and rising investments in manufacturing infrastructure.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa (MEA) region is anticipated to exhibit the highest CAGR, driven by growing industrial diversification, infrastructure development, and agricultural expansion. The region's nations are making significant investments in contemporary farming methods, where PMP-based adjuvants are essential for increasing water and pesticide efficiency. At the same time, the use of PMPs in paints, inks, and adhesives is increasing due to the growing demand for advanced coatings, sealants, and construction materials, particularly in the Gulf Cooperation Council (GCC) countries. Moreover, MEA nations are anticipated to

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become the world's fastest-growing market for PMPs as they continue to embrace high-performance additives across all industries and shift toward sustainable industrial practices.

Key players in the market

Some of the key players in Polyether Modified Polysiloxane Market include BASF SE, Momentive Performance Materials Inc., Gelest, Inc., Wacker Chemie AG, Evonik Industries AG, Dow Chemical Company, Shin-Etsu Chemical Co., Ltd., Elkem ASA, Siltech Corporation, BRB International BV, SILIBASE SILICONE, Hangzhou Topwin Technology Development Co., Ltd., AB Speciality Silicones and Supreme Silicones Ltd.

Key Developments:

In April 2025, BASF and the University of Toronto have signed a Master Research Agreement (MRA) to streamline innovation projects and increase collaboration between BASF and Canadian researchers. This partnership is part of a regional strategy to extend BASF's collaboration with universities in North America into Canada. This is a great achievement for BASF, as it marks the company's first MRA with a Canadian university.

In March 2025, Momentive Performance Materials group (Momentive) and silicon products manufacturer Jiangxi Hungpai Material have signed a definitive agreement to establish a joint venture focused on the manufacturing and sale of silanes in Asia. The partnership combines Momentive’s materials expertise with Hungpai’s manufacturing capabilities of silane products, including organofunctional silanes, said Momentive.

In August 2023, Evonik has recently solidified an agreement that holds the potential to significantly impact the methyl methacrylate (MMA) production landscape. The agreement entails the upscaling and production of a tailored catalyst to support R?hm's upcoming MMA manufacturing facility in Bay City, Texas, USA. Set to open its doors in 2024, this advanced plant signifies a leap forward in Rohm's production capabilities.

Forms Covered:

- Oil
- Solid

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Grades Covered:

- Low
- Medium
- High

End Users Covered:

- Agriculture
- Plastic Processing
- Ink and Coatings
- Cosmetics and Personal Care
- Pulp and Paper
- Adhesives and Sealants
- Textile
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe

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- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

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- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

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Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as

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per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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