

Superabsorbent Polymer Sourcing Market Forecasts to 2034 – Global Analysis By Source Type (Petroleum-based SAPs, Bio-based SAPs and Hybrid & Modified SAPs), Procurement Model, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Superabsorbent Polymer Sourcing Market is accounted for \$0.9 billion in 2026 and is expected to reach \$1.4 billion by 2034 growing at a CAGR of 6.2% during the forecast period. Sourcing superabsorbent polymers requires obtaining key inputs like acrylic acid and sodium hydroxide from dependable vendors to maintain product performance. Companies focus on suppliers that offer stable quality, competitive pricing, and adherence to environmental standards. Procurement strategies are influenced by regional manufacturing centers, transportation efficiency, and fluctuations in petrochemical markets. To reduce supply risks, businesses rely on diversified supplier networks and long-term agreements. Increasingly, firms are also emphasizing sustainable sourcing, including eco-friendly materials and lower emissions. Efficient procurement practices support uninterrupted manufacturing, cost control, and responsiveness to rising demand across hygiene products, farming solutions, and various industrial uses.

According to the U.S. Department of Agriculture (USDA), superabsorbent polymers (SAPs) were first developed in 1973 as starch-based materials capable of absorbing up to 400 times their weight in distilled water, specifically for agricultural purposes. This marked the beginning of SAPs as a recognized technology in the parent market of advanced absorbent materials.

Market Dynamics:

Driver:

Rising demand from hygiene products industry

The expanding use of hygiene-related goods, including diapers, sanitary products, and

incontinence solutions, significantly boosts the sourcing of superabsorbent polymers. Population growth, improving living standards, and greater hygiene awareness are key contributing factors. Producers are increasing manufacturing output to satisfy this surge, thereby raising the need for essential raw materials such as acrylic acid. As a result, companies must strengthen their supply chains, build reliable supplier partnerships, and adopt cost-efficient sourcing methods to ensure steady material availability and consistently meet evolving consumer requirements.

Restraint:

Dependence on petrochemical industry

Heavy reliance on petrochemical-derived inputs such as acrylic acid restricts the superabsorbent polymer sourcing market. Since these materials are linked to oil refining processes, their availability and pricing are influenced by crude oil fluctuations, energy market shifts, and geopolitical instability. Any disruption in petrochemical production can quickly affect supply continuity and increase costs. This dependency reduces flexibility in sourcing alternatives and exposes manufacturers to higher operational risks. As a result, companies find it difficult to maintain stable procurement systems and predictable pricing, making long-term sourcing strategies more challenging in a market closely tied to global oil industry dynamics.

Opportunity:

Growth in agricultural water management solutions

Agricultural applications of superabsorbent polymers offer strong growth prospects for sourcing activities. These materials help retain soil moisture, reduce dependence on irrigation, and improve crop yields, particularly in regions facing water shortages. Increasing climate-related drought conditions are encouraging farmers to adopt efficient water-saving technologies. Support from governments and an agricultural body are also promoting sustainable farming practices. By building stronger supply networks and collaborating with the farming sector, companies can capitalize on expanding opportunities in water-efficient and productivity-focused agricultural solutions.

Threat:

Geopolitical instability and trade restrictions

Political instability and international trade barriers significantly threaten superabsorbent polymer sourcing. Conflicts between major producing and consuming nations can disrupt supply networks and restrict access to key raw materials. Measures such as tariffs, export controls, and sanctions further complicate global procurement processes. These factors increase costs and create uncertainty in international trade operations. Companies relying on global suppliers face risks of delayed deliveries and limited material supply. To manage these challenges, firms often diversify sourcing locations, but unpredictable geopolitical shifts still make long-term planning difficult.

Covid-19 Impact:

The COVID-19 outbreak severely impacted superabsorbent polymer sourcing by disrupting global supply chains and limiting the availability of essential raw materials. Manufacturing shutdowns and lockdown restrictions in key regions caused shortages of inputs such as acrylic acid. Transportation delays, port backlogs, and workforce constraints further complicated procurement activities. At the same time, demand for hygiene-related products, including diapers and sanitary goods, increased sharply, partly balancing market pressures. Companies responded by expanding supplier networks, building higher inventory buffers, and strengthening risk management practices.

The petroleum-based SAPs segment is expected to be the largest during the forecast period

The petroleum-based SAPs segment is expected to account for the largest market share during the forecast period because they benefit from established manufacturing technologies, economical production, and easy access to petrochemical raw materials. These polymers are mainly produced using feedstock's like acrylic acid, enabling large-scale and efficient output. They are widely utilized in hygiene applications, including diapers, sanitary products, and adult care items, which account for a major portion of demand. A strong global production network and well-developed industrial base further reinforce their leading position.

The agricultural input suppliers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the agricultural input suppliers segment is predicted to witness the highest growth rate because of increasing demand for water-saving agricultural technologies. These polymers are widely used to enhance soil water retention, improve crop productivity, and minimize irrigation needs, particularly in regions facing water shortages. Rising environmental challenges and climate change are pushing farmers toward efficient water management solutions. Support from government initiatives and a sustainability program is further driving adoption in farming practices. This growing demand is encouraging suppliers to expand procurement capabilities and ensure steady access to raw materials to meet large-scale agricultural application requirements.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share owing to its extensive manufacturing infrastructure, easy access to raw materials, and strong demand from hygiene and agricultural sectors. Key countries such as China, Japan, and South Korea play a significant role in both production and consumption, supported by a mature petrochemical industry. Increasing population, urban development, and rising income levels are boosting the use of hygiene products and agricultural solutions. In addition, strong export capacity further strengthens its leadership position as a major global sourcing center for superabsorbent polymers.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR due to accelerating industrial development, population expansion, and rising demand from hygiene and agriculture sectors. Increasing awareness of personal care products and higher usage of diapers and sanitary goods are major contributors to market expansion. The agricultural industry is also adopting these polymers to improve irrigation efficiency and crop output. Supportive government policies for infrastructure growth and sustainable agriculture further drive demand. Combined with strong manufacturing capabilities and cost-effective production advantages, the region continues to attract global investments, making it the fastest-growing sourcing hub.

Key players in the market

Some of the key players in Superabsorbent Polymer Sourcing Market include BASF SE, Evonik Industries, Nippon Shokubai, LG Chem, Formosa Plastics, Sumitomo Seika Chemicals, Sanyo Chemical Industries, SDP Global, Yixing Danson Technology, Satellite Chemical, Wanhua Chemical Group, Quanzhou Banglida Technology, Shandong Nuor Biological, Zhejiang Weilong Polymer, Kao Corporation, Songwon Industrial, Chemtex Speciality Limited and San-Dia Polymers.

Key Developments:

In September 2025, LG Chem announced that Toyota Tsusho Corporation had acquired a 25% stake in LG-HY BCM, the company's cathode materials plant in Gumi, thereby joining as the second-largest shareholder. Toyota Tsusho, the general trading company of the Toyota Group, plays a vital role in Toyota Motor's raw material procurement.

In March 2025, Evonik has entered into an exclusive agreement with the Cleveland-based Sea-Land Chemical Company for the distribution of its cleaning solutions in the U.S. The agreement builds on a long-standing relationship with the distributor and expands the reach of Evonik's cleaning solutions to the entire U.S. region.

In March 2025, Kao has recently signed an agreement to make future purchases of palm oil alternative from Future Origins of the United States. Future Origins is a U.S. joint venture founded by industrial biotechnology leader Geno, partnered with Kao, Unilever and L'Oréal, with the aim of commercializing and manufacturing ingredients for widely used surfactants in home and personal care applications.

Source Types Covered:

Petroleum-based SAPs

Bio-based SAPs

Hybrid & Modified SAPs

Procurement Models Covered:

Direct Sourcing

Indirect Sourcing

Contract Manufacturing & Tolling

Applications Covered:

Personal Hygiene

Agriculture

Medical & Healthcare

Industrial

End Users Covered:

FMCG & Hygiene Product Manufacturers

Agricultural Input Suppliers

Healthcare Institutions

Industrial Product Manufacturers

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

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

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