

Waterborne Polyurethane Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Anionic PUDs, Cationic PUDs, Non-Ionic PUDs, Single-Component Polyurethane, Two-Component Polyurethane, Others), By End User (Building & Construction, Automotive, Electronics & Electricals, Textile, Packaging, Others), By Region and Competition, 2020-2030F

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Abstracts

Market Overview

The Global Waterborne Polyurethane Market was valued at USD 1.85 billion in 2024 and is projected to reach USD 2.36 billion by 2030, growing at a CAGR of 4.32%. Waterborne polyurethane (WPU), known for its versatility and eco-friendly nature, is manufactured by dispersing polyurethane resins in water. It typically includes compounds like hexamethylene diisocyanate, carbamate, and polystyrene, and is noted for its low volatile organic compound (VOC) emissions. These attributes make WPU ideal for use in coatings, adhesives, ink binders, and paints. The building and construction sector continues to fuel market growth, although the COVID-19 pandemic in 2020 temporarily disrupted operations due to raw material shortages and labor constraints. Recovery began in 2021 with the easing of restrictions and renewed activity in the transportation sector, setting a strong foundation for future expansion of the waterborne polyurethane market.

Key Market Drivers

Growing Demand of Waterborne Polyurethane from Automotive Industry

Waterborne polyurethane (WPU) is increasingly vital to the automotive sector because of its superior performance characteristics. These include excellent abrasion resistance, strong flexibility, high adhesion, and effective low-temperature durability. WPU is widely utilized in automotive applications such as sealants, coatings, adhesives, and elastomers, with automotive coatings being a particularly significant segment. Rising per capita income and changing consumer preferences toward personal mobility are propelling industry growth. This anticipated increase in passenger car sales is expected to significantly elevate demand for automotive paints and coatings, which serve both aesthetic and protective functions by safeguarding vehicles from environmental factors, corrosion, and daily wear.

Key Market Challenges

Volatility in Prices of Raw Materials

Waterborne polyurethane production depends heavily on raw materials derived from crude oil, especially isocyanates and polyols, including ethylene carbonate, which are prone to significant price fluctuations. These costs are tightly linked to the volatile nature of crude oil prices, influenced by global events such as geopolitical tensions, natural calamities, economic disturbances, and supply changes by oil-producing countries. When oil prices surge, production costs for WPU also rise, thereby increasing overall manufacturing expenses. Conversely, during periods of price decline, manufacturers may face delays in adjusting their pricing due to existing stock levels or contractual obligations, leading to reduced competitiveness and squeezed profit margins.

Key Market Trends

Increased Advancements in Formulations

Despite its established advantages like flexibility, adhesion, and abrasion resistance, continuous innovation is enhancing the capabilities of waterborne polyurethane (WPU). Researchers and producers are striving to improve these properties to broaden the scope of WPU applications. The trend is shifting from traditional 1K solventborne polyurethane coatings used in wood flooring to 2K waterborne polyurethane formulations, driven by stricter VOC regulations and growing preference for low-odor products. These newer formulations offer benefits such as greater durability, stain resistance, maintenance ease, gloss customization, and improved adhesion to reactive

surfaces, ultimately boosting their visual appeal and performance across diverse industries.

Key Market Players

The 3M Company

Henkel AG & Co. KGaA

The Dow Chemical Company

Bayer Material Science Pvt Ltd

PPG Industries Inc.

BASF SE

The Sherwin-Williams Company

RPM International Inc.

Lamberti SpA

Covestro AG

Report Scope:

In this report, the Global Waterborne Polyurethane Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Waterborne Polyurethane Market, By Product Type:

Anionic PUDs

Cationic PUDs

Non-Ionic PUDs

Single-Component Polyurethane

Two-Component Polyurethane

Others

Waterborne Polyurethane Market, By End User:

Building & Construction

Automotive

Electronics & Electricals

Textile

Packaging

Others

Waterborne Polyurethane Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Waterborne Polyurethane Market.

Available Customizations:

Global Waterborne Polyurethane Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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