

Waterborne Polyurethane Dispersions Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

Market Reprt | 2024-12-27 | 310 pages | Global Market Insights

AVAILABLE LICENSES:

- Single User \$4850.00
- Multi User \$6050.00
- Enterprise User \$8350.00

Report description:

The Global Waterborne Polyurethane Dispersions Market was valued at USD 1.7 billion in 2024 and is projected to grow at a CAGR of 5.9% from 2025 to 2034. This robust growth is fueled by the rising demand for eco-friendly and high-performance materials in diverse applications such as coatings, adhesives, paints, and sealants. Industries increasingly prioritize sustainable and low-VOC solutions to align with global shifts toward environmentally responsible practices. Waterborne polyurethane dispersions offer an exceptional combination of performance, versatility, and eco-friendliness, making them an attractive choice across industries. Additionally, advancements in polymer technology and stricter environmental regulations are further driving the adoption of these dispersions. The growing emphasis on reducing carbon footprints and meeting stringent sustainability standards has positioned waterborne PUDs as a key solution for industries transitioning to greener technologies.

By type, the market is segmented into anionic, cationic, nonionic, self-crosslinking, and hybrid polyurethane dispersions. In 2024, cationic PUDs dominated the market, contributing USD 614.4 million to the overall revenue. Known for their positively charged structure, cationic PUDs deliver superior adhesion, making them particularly valuable in applications such as textiles and packaging, where durable and reliable bonding is critical. Their unique properties position them as an indispensable material in sectors that demand high-performance adhesion solutions.

The market is also categorized based on functionality, dividing into one-component (1K) and two-component (2K) systems. In 2024, one-component systems captured a significant share of 64.5%. These pre-formulated systems eliminate the need for additional curing components, simplifying application processes and enhancing efficiency. Their user-friendly nature makes them a preferred choice in industries where streamlined operations are essential, including construction, automotive, and furniture manufacturing.

The U.S. waterborne polyurethane dispersions market generated USD 460.8 million in 2024, driven by the growing demand for low-VOC, eco-conscious products. Key industries, such as automotive, textiles, and construction, have played a pivotal role in

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

boosting market growth. With increasing regulatory emphasis on green chemistry and sustainable production, the adoption of waterborne PUDs in the U.S. continues to rise. The country's leadership in industrial innovation, coupled with advancements in polymer technology, positions it as a major hub for the development and application of waterborne PUDs. High demand is evident in sectors like automotive, packaging, and wood coatings, as industries prioritize environmentally friendly materials without compromising performance.

Table of Contents:

Report Content

Chapter 1 Methodology & Scope

- 1.1 Market scope & definition
- 1.2 Base estimates & calculations
- 1.3 Forecast calculation
- 1.4 Data sources
 - 1.4.1 Primary
 - 1.4.2 Secondary
 - 1.4.2.1 Paid sources
 - 1.4.2.2 Public sources

Chapter 2 Executive Summary

- 2.1 Industry synopsis, 2021-2034

Chapter 3 Industry Insights

- 3.1 Industry ecosystem analysis
 - 3.1.1 Factor affecting the value chain
 - 3.1.2 Profit margin analysis
 - 3.1.3 Disruptions
 - 3.1.4 Future outlook
 - 3.1.5 Manufacturers
 - 3.1.6 Distributors
- 3.2 Supplier landscape
- 3.3 Profit margin analysis
- 3.4 Key news & initiatives
- 3.5 Regulatory landscape
- 3.6 Impact forces
 - 3.6.1 Growth drivers
 - 3.6.1.1 Growing demand for high-performance products
 - 3.6.1.2 Increasing environmental regulations & demand for sustainable products
 - 3.6.2 Industry pitfalls & challenges
 - 3.6.2.1 High cost
- 3.7 Growth potential analysis
- 3.8 Porter's analysis
- 3.9 PESTEL analysis

Chapter 4 Competitive Landscape, 2024

- 4.1 Introduction
- 4.2 Company market share analysis
- 4.3 Competitive positioning matrix
- 4.4 Strategic outlook matrix

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Chapter 5 Market Size and Forecast, By Type, 2021-2034 (USD Billion, Kilo Tons)

- 5.1 Key trends
- 5.2 Anionic PUDs
- 5.3 Cationic PUDs
- 5.4 Nonionic PUDs
- 5.5 Self-crosslinking PUDs
- 5.6 Hybrid PUDs

Chapter 6 Market Size and Forecast, By Functionality, 2021-2034 (USD Billion, Kilo Tons)

- 6.1 Key trends
- 6.2 One-component (1K) systems
- 6.3 Two-component (2K) systems

Chapter 7 Market Size and Forecast, By Application, 2021-2034 (USD Billion, Kilo Tons)

- 7.1 Key trends
- 7.2 Adhesives & sealants
- 7.3 Coatings
- 7.4 Synthetic leather production
- 7.5 Flexible packaging
- 7.6 Others

Chapter 8 Market Size and Forecast, By End Use Industry, 2021-2034 (USD Billion, Kilo Tons)

- 8.1 Key trends
- 8.2 Automotive
- 8.3 Construction
- 8.4 Textile
- 8.5 Furniture
- 8.6 Packaging
- 8.7 Others

Chapter 9 Market Size and Forecast, By Region, 2021-2034 (USD Billion, Kilo Tons)

- 9.1 Key trends
- 9.2 North America
 - 9.2.1 U.S.
 - 9.2.2 Canada
- 9.3 Europe
 - 9.3.1 UK
 - 9.3.2 Germany
 - 9.3.3 France
 - 9.3.4 Italy
 - 9.3.5 Spain
 - 9.3.6 Russia
- 9.4 Asia Pacific
 - 9.4.1 China
 - 9.4.2 India
 - 9.4.3 Japan
 - 9.4.4 South Korea
 - 9.4.5 Australia
- 9.5 Latin America
 - 9.5.1 Brazil
 - 9.5.2 Mexico

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.6 MEA

9.6.1 South Africa

9.6.2 Saudi Arabia

9.6.3 UAE

Chapter 10 Company Profiles

10.1 BASF

10.2 Cargill

10.3 Covestro

10.4 DIC Corporation

10.5 Dow

10.6 Evonik

10.7 HMG Paints

10.8 Huntsman

10.9 Lanxess

10.10 Nippon Polyurethane

10.11 PPG Industries

10.12 RPM International

10.13 Toyo Kasei

10.14 Wacker Chemie

□

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Waterborne Polyurethane Dispersions Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

Market Reprt | 2024-12-27 | 310 pages | Global Market Insights

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4850.00
	Multi User	\$6050.00
	Enterprise User	\$8350.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-05"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

