

Polyurethane Dispersions Market By Type (Solvent-Free Polyurethane Dispersions, Low-Solvent Polyurethane Dispersions), By Chemistry (Anionic Polyurethane Dispersions, Cationic Polyurethane Dispersions, Nonionic Polyurethane Dispersions, Self-Crosslinking Polyurethane Dispersions, Hybrid Polyurethane Dispersions), By Functionality [One-Component (1k) Systems, Two-Component (2k) Systems], By Application (Paints & Coatings, Adhesives & Sealants, Leather Manufacturing & Finishing, Textile Finishing), and Region - Global Forecast to 2030

Market Report | 2025-12-01 | 274 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The polyurethane dispersions market is projected to reach USD 4.34 billion by 2030 from USD 3.00 billion in 2025, at a CAGR of 7.7% during the forecast period.

<https://mnmimg.marketsandmarkets.com/Images/polyurethane-dispersions-market-img-overview.webp>

Polyurethane dispersions (PUDs) are increasingly being adopted across various industries, including automotive, construction, textiles, adhesives, leather finishing, and wood coatings. One major factor driving this trend is the implementation of stricter environmental regulations and the rapid phase-out of solvent-based polyurethane systems. Regulatory agencies, such as the Environmental Protection Agency (EPA) and the European Chemicals Agency (ECHA), as well as regional VOC directives like

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

REACH and the EU DECO-PAINT DIRECTIVE (2004/42/EC), are enforcing lower emissions standards, prompting manufacturers to switch to waterborne PUD technologies. Modern hybrid, anionic, and cationic PUDs offer a range of advantages, including excellent film-forming capabilities, mechanical durability against physical stressors, chemical resistance, strong adhesion to surfaces, and low VOC levels, all while ensuring safer handling methods. High-performance coating systems that utilize these types of PUDs are found in various sectors, including automotive OEMs, leather finishing, waterproof textiles, industrial wood coatings, and flexible packaging adhesives.

"Solvent-free polyurethane dispersions are projected to be the fastest-growing type during the forecast period."

Solvent-free polyurethane solutions are projected to grow rapidly in the PUD market due to increasing demand for environmentally friendly products with low VOC content. These solutions, which do not use organic solvents, offer superior physical properties, chemical resistance, and film formation compared to traditional options. Their zero-solvent content makes them ideal for sensitive applications, such as leather, textiles, packaging, wood coatings, and automotive interiors. With rising regulatory pressures to reduce VOC emissions, advancements in polycarbonate polyols and renewable feedstocks are enhancing the durability and performance of solventless PUDs. As manufacturers shift towards greener alternatives without compromising efficiency, solvent-free polyurethane solutions are driving growth in the global PUD market.

?

"Paints & coatings are projected to be the fastest-growing applications in the market."

The market is expected to grow rapidly due to the rising demand for low-VOC and eco-friendly coatings in sectors such as construction, automotive, and wood. PUD coatings provide excellent adhesion, chemical and moisture resistance, and flexibility, making them a preferred alternative to solvent-based options amid stricter emission regulations. Their superior durability and improved aesthetics enhance their use in architectural coatings, automotive refinishing, and protective finishes. Additionally, the shift toward sustainable manufacturing practices and the development of waterborne and solvent-free formulations will further drive the adoption of PUD. As industries seek greener technologies and better performance, PUDs will play a crucial role in advancing next-generation coatings, ensuring strong market growth.

"Asia Pacific is projected to be the fastest-growing region in the polyurethane dispersions market during the forecast period."

The rapid industrialization, increased manufacturing opportunities, and rising demand for eco-friendly coating technologies are driving market growth in the Asia Pacific. Countries such as China, India, South Korea, and Indonesia have seen significant growth in sectors like automotive, textile, construction, and packaging, which are major consumers of waterborne PUD-based coatings, adhesives, and sealants. The shift toward low-VOC, solvent-free, and sustainable formulations has been fueled by stricter environmental regulations, such as China's VOC limits, and government-supported Green Chemistry initiatives in India. These factors are increasing the demand for PUD products throughout the region. Furthermore, government investments in building infrastructure, the expansion of local production capabilities, and the presence of competitive manufacturers are also contributing to the market's growth.

In-depth interviews have been conducted with chief executive officers (CEOs), directors, and other executives from various key organizations operating in the PUDs marketplace.

By Company Type: Tier 1: 40%, Tier 2: 30%, and Tier 3: 30%

By Designation: Directors: 30%, Managers: 20%, and Others: 50%

By Region: North America: 20%, Europe: 10%, Asia Pacific: 40%, South America: 10%, and the Middle East & Africa: 20%

Covestro AG (Germany), BASF (Germany), Dow (US), Wanhua (China), Lubrizol (US), Mitsui Chemicals, Inc. (Japan), Alberdingk Boley GmbH (Germany), Perstorp (Sweden), Stahl Holdings B.V. (Netherlands), and UBE Corporation (Japan) are some companies covered in the report.

The study includes an in-depth competitive analysis of these key players in the polyurethane dispersions market, with their company profiles, recent developments, and key market strategies.

Research Coverage

This research report categorizes the polyurethane dispersions market based on by type (solvent-free polyurethane dispersions, low-solvent polyurethane dispersions), by chemistry (anionic polyurethane dispersions, cationic polyurethane dispersions, nonionic polyurethane dispersions, self-crosslinking polyurethane dispersions, hybrid polyurethane dispersions), by functionality (one-component (1k) systems, two-component (2k) systems), by application (paints & coatings, adhesives & sealants, leather

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

manufacturing & finishing, textile finishing). The report's scope encompasses detailed information regarding the drivers, restraints, challenges, and opportunities that influence the growth of the polyurethane dispersions market. A detailed analysis of key industry players has been conducted to provide insights into their business overview, products offered, and key strategies, including mergers, acquisitions, product launches, and expansions, associated with the polyurethane dispersions market. This report covers a competitive analysis of upcoming startups in the polyurethane dispersions market ecosystem.

Reasons to Buy the Report

The report will provide market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall polyurethane dispersions market and its subsegments. It will help stakeholders understand the competitive landscape, gain more insights into positioning their businesses better, and plan suitable go-to-market strategies. The report will help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following points.

- Analysis of key drivers (accelerating adoption of low-VOC and environmentally compliant coatings, growing demand from automotive, construction, and industrial applications, expansion in synthetic leather and functional textile finishing), restraints (higher production costs limiting wider adoption, limited solvent and chemical resistance in certain grades), opportunities (expanding the bio-based & circular polyurethane dispersions market through sustainable innovation, unlocking high-performance industrial & specialty applications with advanced polyurethane dispersions), and challenges (sustaining performance while complying with environmental norms, navigating fierce cost competition from low-cost regional polyurethane dispersions producers).
- Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and product & service launches in the polyurethane dispersions market.
- Market Development: Comprehensive information about profitable markets - the report analyzes the polyurethane dispersions market across varied regions.
- Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the polyurethane dispersions market.
- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Covestro AG (Germany), BASF (Germany), Dow (US), Wanhua (China), Lubrizol (US), Mitsui Chemicals, Inc. (Japan), Alberdingk Boley GmbH (Germany), Perstorp (Sweden), Stahl Holdings B.V. (Netherlands), and UBE Corporation (Japan), among others.

Table of Contents:

1	INTRODUCTION	7
1.1	STUDY OBJECTIVES	7
1.2	MARKET DEFINITION	7
1.3	STUDY SCOPE	8
1.3.1	MARKETS COVERED AND REGIONAL SCOPE	8
1.3.2	INCLUSIONS AND EXCLUSIONS	9
1.3.3	YEARS CONSIDERED	9
1.3.4	CURRENCY CONSIDERED	30
1.3.5	UNITS CONSIDERED	30
1.4	STAKEHOLDERS	30
2	EXECUTIVE SUMMARY	31
2.1	KEY INSIGHTS AND MARKET HIGHLIGHTS	31
2.2	KEY MARKET PARTICIPANTS: SHARE INSIGHTS AND STRATEGIC DEVELOPMENTS	32
2.3	DISRUPTIVE TRENDS SHAPING MARKET	33
2.4	HIGH-GROWTH SEGMENTS & EMERGING FRONTIERS	34
2.5	SNAPSHOT: GLOBAL MARKET SIZE, GROWTH RATE, AND FORECAST	35
3	PREMIUM INSIGHTS	36

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

3.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN POLYURETHANE DISPERSIONS MARKET	36
3.2	POLYURETHANE DISPERSIONS MARKET, BY TYPE	36
3.3	POLYURETHANE DISPERSIONS MARKET, BY CHEMISTRY	37
3.4	POLYURETHANE DISPERSIONS MARKET, BY FUNCTIONALITY	37
3.5	POLYURETHANE DISPERSIONS MARKET, BY APPLICATION	38
3.6	POLYURETHANE DISPERSIONS MARKET, BY KEY COUNTRY	38
4	MARKET OVERVIEW	39
4.1	INTRODUCTION	39
4.2	MARKET DYNAMICS	39
4.2.1	DRIVERS	40
4.2.1.1	Accelerating adoption of low-VOC and environmentally compliant coatings	40
4.2.1.2	Growing demand from automotive, construction, and industrial applications	40
4.2.1.3	Expansion in synthetic leather and functional textile finishing	41
4.2.2	RESTRAINTS	41
4.2.2.1	Higher production costs limiting wider adoption	41
4.2.2.2	Limited solvent and chemical resistance in certain grades	42
4.2.3	OPPORTUNITIES	42
4.2.3.1	Expanding bio-based & circular polyurethane dispersions market through sustainable innovation	42
4.2.3.2	Unlocking high-performance industrial & specialty applications	43
4.2.4	CHALLENGES	43
4.2.4.1	Sustaining performance while complying with environmental norms	43
4.2.4.2	Navigating fierce cost competition from low-cost regional polyurethane dispersions producers	43
4.3	UNMET NEEDS AND WHITE SPACES	44
4.3.1	UNMET NEEDS IN POLYURETHANE DISPERSIONS MARKET	44
4.3.2	WHITE SPACE OPPORTUNITIES	44
4.4	INTERCONNECTED MARKETS AND CROSS-SECTOR OPPORTUNITIES	45
4.4.1	INTERCONNECTED MARKETS	45
4.4.2	CROSS-SECTOR OPPORTUNITIES	46
4.5	STRATEGIC MOVES BY TIER-1/2/3 PLAYERS	46
4.5.1	KEY MOVES AND STRATEGIC FOCUS	46
5	INDUSTRY TRENDS	48
5.1	PORTER'S FIVE FORCES ANALYSIS	48
5.1.1	THREAT OF NEW ENTRANTS	49
5.1.2	THREAT OF SUBSTITUTES	49
5.1.3	BARGAINING POWER OF SUPPLIERS	49
5.1.4	BARGAINING POWER OF BUYERS	50
5.1.5	INTENSITY OF COMPETITIVE RIVALRY	50
5.2	MACROECONOMIC ANALYSIS	50
5.2.1	INTRODUCTION	50
5.2.2	GDP TRENDS AND FORECASTS	51
5.3	VALUE CHAIN ANALYSIS	51
5.4	ECOSYSTEM ANALYSIS	53
5.4.1	PRICING ANALYSIS	54
5.4.1.1	Pricing analysis based on application	55
5.4.1.2	Pricing analysis based on region	55

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.5 TRADE ANALYSIS 56
- 5.5.1 EXPORT SCENARIO (HS CODE 390950) 56
- 5.5.2 IMPORT SCENARIO (HS CODE 390950) 57
- 5.6 KEY CONFERENCES AND EVENTS, 2025-2026 59
- 5.7 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 60
- 5.7.1 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 60
- 5.8 INVESTMENT AND FUNDING SCENARIO 61
- 5.9 CASE STUDY ANALYSIS 62
- 5.9.1 COVESTRO & JOWAT (FURNITURE LAMINATION USING DISPERCOLL U) 62
- 5.9.2 BASF (JONCRYL PUD SYSTEMS FOR INDUSTRIAL WOOD COATINGS) 63
- 5.9.3 PERMUTHANE WATERBORNE POLYURETHANE DISPERSIONS-ST AHL (PUDS FOR AUTOMOTIVE SYNTHETIC LEATHER) 63
- 5.10 IMPACT OF 2025 US TARIFF: POLYURETHANE DISPERSIONS MARKET 63
- 5.10.1 INTRODUCTION 63
- 5.10.2 KEY TARIFF RATES 64
- 5.10.3 PRICE IMPACT ANALYSIS 64
- 5.10.4 IMPACT ON COUNTRY/REGION 65
- 5.10.4.1 US 65
- 5.10.4.2 China 65
- 5.10.4.3 Europe 65
- 5.10.4.4 Mexico 65
- 5.10.5 END-USE INDUSTRY IMPACT 65
- 6 STRATEGIC DISRUPTION THROUGH TECHNOLOGY, PATENTS, DIGITAL, AND AI ADOPTIONS 66
- 6.1 KEY EMERGING TECHNOLOGIES 66
- 6.1.1 LOW-SOLVENT AND WATERBORNE POLYURETHANE DISPERSIONS 66
- 6.1.2 FUNCTIONAL ADDITIVES FOR ENHANCED PERFORMANCE 66
- 6.1.3 SELF-CROSSLINKING AND HYBRID POLYURETHANE SYSTEMS 66
- 6.2 COMPLEMENTARY TECHNOLOGIES 67
- 6.2.1 BIO-BASED POLYURETHANE PRECURSORS 67
- 6.3 ADJACENT TECHNOLOGIES 67
- 6.3.1 SMART COATINGS AND FUNCTIONAL INTEGRATION 67
- 6.4 TECHNOLOGY/PRODUCT ROADMAP 67
- 6.4.1 SHORT-TERM (2025-2027) | FOUNDATION & EARLY COMMERCIALIZATION 67
- 6.4.2 MID-TERM (2027-2030) | EXPANSION & INTEGRATION 68
- 6.4.3 LONG-TERM (2030-2035+) | MATURITY & ADVANCED SYSTEMS 68
- 6.5 PATENT ANALYSIS 69
- 6.5.1 INTRODUCTION 69
- 6.5.2 METHODOLOGY 69
- 6.5.3 POLYURETHANE DISPERSIONS MARKET, PATENT ANALYSIS, 2015-2024 69
- 6.6 FUTURE APPLICATIONS 73
- 6.6.1 SMART AND FUNCTIONAL COATINGS FOR INDUSTRY 4.0 APPLICATIONS 73
- 6.6.2 ECO-FRIENDLY AND BIO-BASED POLYURETHANE DISPERSIONS 74
- 6.6.3 HIGH-PERFORMANCE COATINGS FOR ADVANCED MATERIALS 74
- 6.6.4 FUNCTIONAL ADHESIVES AND COATINGS FOR MEDICAL AND PACKAGING APPLICATIONS 75
- 6.7 IMPACT OF AI/GEN AI ON POLYURETHANE DISPERSIONS MARKET 75
- 6.7.1 TOP USE CASES AND MARKET POTENTIAL 75
- 6.7.2 BEST PRACTICES IN POLYURETHANE DISPERSION MANUFACTURING 76
- 6.7.3 CASE STUDIES OF AI IMPLEMENTATION IN POLYURETHANE

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

DISPERSIONS MARKET 76

6.7.4 INTERCONNECTED ADJACENT ECOSYSTEM AND IMPACT

ON MARKET PLAYERS 76

6.7.5 CLIENTS' READINESS TO ADOPT GENERATIVE AI IN POLYURETHANE DISPERSIONS MARKET 77

6.8 SUCCESS STORIES AND REAL-WORLD APPLICATIONS 77

6.8.1 AUTOMOTIVE INTERIOR COATINGS & ADHESIVES 77

6.8.2 SUSTAINABLE INTERIOR WALL & FURNITURE COATINGS 77

6.8.3 WOOD AND FURNITURE COATINGS WITH ENHANCED SURFACE FEEL 77

6.8.4 FUNCTIONAL AND ACOUSTIC COATINGS (ACADEMIC/R&D) 78

7 SUSTAINABILITY AND REGULATORY LANDSCAPE 79

7.1 REGIONAL REGULATIONS AND COMPLIANCE 79

7.1.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 79

7.1.2 INDUSTRY STANDARDS 82

7.2 SUSTAINABILITY INITIATIVES 82

7.2.1 CARBON IMPACT AND ECO-APPLICATIONS OF POLYURETHANE DISPERSIONS 83

7.2.1.1 Carbon Impact Reduction 83

7.2.1.2 Eco-Applications 83

7.3 SUSTAINABILITY IMPACT AND REGULATORY POLICY INITIATIVES 84

7.4 CERTIFICATIONS, LABELING, ECO-STANDARDS 84

8 CUSTOMER LANDSCAPE & BUYER BEHAVIOR 86

8.1 DECISION-MAKING PROCESS 86

8.2 BUYER STAKEHOLDERS AND BUYING EVALUATION CRITERIA 88

8.2.1 KEY STAKEHOLDERS IN BUYING PROCESS 88

8.2.2 BUYING CRITERIA 89

8.3 ADOPTION BARRIERS & INTERNAL CHALLENGES 89

8.4 UNMET NEEDS FROM VARIOUS END-USE INDUSTRIES 91

8.5 MARKET PROFITABILITY 92

8.5.1 REVENUE POTENTIAL 92

8.5.2 COST DYNAMICS 92

8.5.3 MARGIN OPPORTUNITIES BY APPLICATION 93

9 POLYURETHANE DISPERSIONS MARKET, BY TYPE 94

9.1 INTRODUCTION 95

9.2 SOLVENT-FREE POLYURETHANE DISPERSIONS 96

9.2.1 LOW IMPACT ON ENVIRONMENT TO DRIVE MARKET 96

9.3 LOW-SOLVENT POLYURETHANE DISPERSIONS 97

9.3.1 VARIOUS ATTRIBUTES LIKELY TO INFLUENCE MARKET 97

?

10 POLYURETHANE DISPERSIONS MARKET, BY CHEMISTRY 98

10.1 INTRODUCTION 99

10.2 ANIONIC POLYURETHANE DISPERSIONS 101

10.2.1 WIDESPREAD INDUSTRIAL ADOPTION DRIVEN BY VERSATILITY, COST-EFFICIENCY, AND REGULATORY COMPLIANCE 101

10.3 CATIONIC POLYURETHANE DISPERSIONS 101

10.3.1 GROWING USE IN SPECIALTY APPLICATIONS SUPPORTED BY SUPERIOR SUBSTRATE ADHESION AND ANTIMICROBIAL PERFORMANCE 101

10.4 NONIONIC POLYURETHANE DISPERSIONS 102

10.4.1 INCREASING DEMAND IN HIGH-TEMPERATURE AND SPECIALIZED PLUMBING APPLICATIONS TO PROPEL MARKET 102

10.5 SELF-CROSSLINKING POLYURETHANE DISPERSIONS 102

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 10.5.1 RISING FOCUS ON HIGH-DURABILITY, LOW-VOC COATINGS ACCELERATES ADOPTION OF SELF-CROSSLINKING SYSTEMS 102
- 10.6 HYBRID POLYURETHANE DISPERSIONS 103
- 10.6.1 GROWING PREFERENCE FOR COST-OPTIMIZED, PERFORMANCE-ENHANCED SYSTEMS DRIVES HYBRID PUD ADOPTION 103
- 11 POLYURETHANE DISPERSIONS MARKET, BY FUNCTIONALITY 104
- 11.1 INTRODUCTION 105
- 11.2 ONE-COMPONENT (1) SYSTEMS 106
- 11.2.1 GROWING PREFERENCE FOR EASY-TO-APPLY, LOW-VOC COATINGS TO DRIVE EXPANSION OF 1K POLYURETHANE DISPERSIONS TECHNOLOGIES 106
- 11.3 TWO-COMPONENT (2K) SYSTEMS 107
- 11.3.1 RISING NEED FOR HIGH-DURABILITY AND CHEMICALLY RESISTANT COATINGS TO DRIVE ADOPTION 107
- 12 POLYURETHANE DISPERSIONS MARKET, BY APPLICATION 108
- 12.1 INTRODUCTION 109
- 12.2 PAINTS & COATINGS 111
- 12.2.1 SHIFT TOWARD LOW-VOC, HIGH-PERFORMANCE FINISHES TO ACCELERATE ADOPTION OF WATERBORNE POLYURETHANE DISPERSION COATINGS 111
- 12.2.2 AUTOMOTIVE COATING 111
- 12.2.3 WOOD COATING 111
- 12.2.4 FLOOR COATING 112
- 12.2.5 HYGIENE COATING 112
- 12.3 ADHESIVES & SEALANTS 112
- 12.3.1 FAVORABLE ATTRIBUTES OF POLYURETHANE DISPERSIONS LIKELY TO DRIVE THEIR USE 112
- 12.4 LEATHER MANUFACTURING & FINISHING 113
- 12.4.1 GROWING APPLICATIONS IN LEATHER INDUSTRY TO DRIVE MARKET 113
- 12.5 TEXTILE FINISHING 113
- 12.5.1 PHYSICAL AND MECHANICAL PROPERTIES OF POLYURETHANE DISPERSIONS TO INCREASE APPLICATIONS 113
- ?
- 12.6 OTHER APPLICATIONS 113
- 12.6.1 GLASS FIBER SIZING 114
- 12.6.2 MEDICAL FILMS & GLOVES 114
- 12.6.3 COSMETICS 114
- 12.6.4 GRAPHIC INKS 114
- 12.6.5 PAPER FINISHING 114
- 13 POLYURETHANE DISPERSIONS MARKET, BY REGION 115
- 13.1 INTRODUCTION 116
- 13.2 EUROPE 117
- 13.2.1 GERMANY 122
- 13.2.1.1 Growing renovation activities to accelerate applications in paints and coatings applications 122
- 13.2.2 FRANCE 124
- 13.2.2.1 Expanding construction and foreign investment to drive market 124
- 13.2.3 ITALY 125
- 13.2.3.1 Industrial rebound to expand market 125
- 13.2.4 SPAIN 127
- 13.2.4.1 Rising industrial investments and strong automotive supply chain to accelerate market growth 127
- 13.2.5 UK 129
- 13.2.5.1 Major infrastructure investments and automotive expansion to drive market 129
- 13.2.6 REST OF EUROPE 130

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

13.3	ASIA PACIFIC	132
13.3.1	CHINA	137
13.3.1.1	Rapid industrialization and infrastructure development to drive market growth	137
13.3.2	JAPAN	139
13.3.2.1	Urban redevelopment and automotive leadership to propel market growth	139
13.3.3	INDIA	140
13.3.3.1	Government initiatives and industrial growth to fuel market expansion	140
13.3.4	SOUTH KOREA	142
13.3.4.1	Strategic infrastructure investments and EV advancements to boost demand	142
13.3.5	REST OF ASIA PACIFIC	144
13.4	MIDDLE EAST & AFRICA	145
13.4.1	GCC COUNTRIES	149
13.4.1.1	Saudi Arabia	151
13.4.1.1.1	Economic diversification and mega projects propel market	151
13.4.1.2	UAE	153
13.4.1.2.1	Construction activities and automotive initiatives to drive demand	153
13.4.1.3	Rest of GCC countries	154
13.4.2	SOUTH AFRICA	156
13.4.2.1	Government initiatives and industrial growth to increase consumption	156
13.4.3	REST OF MIDDLE EAST & AFRICA	158
13.5	NORTH AMERICA	159
13.5.1	US	163
13.5.1.1	Strengthening construction and EV manufacturing to drive market growth	163
13.5.2	CANADA	165
13.5.2.1	Net-Zero push and EV infrastructure investments to increase demand	165
13.5.3	MEXICO	167
13.5.3.1	Growth of construction and water infrastructure sectors to fuel market	167
13.6	SOUTH AMERICA	169
13.6.1	BRAZIL	172
13.6.1.1	Rapid industrialization to influence market growth	172
13.6.2	ARGENTINA	174
13.6.2.1	Improving economic conditions to support market growth	174
13.6.3	REST OF SOUTH AMERICA	176
14	COMPETITIVE LANDSCAPE	179
14.1	OVERVIEW	179
14.2	KEY PLAYERS' STRATEGIES/RIGHT TO WIN	179
14.3	REVENUE ANALYSIS	181
14.4	MARKET SHARE ANALYSIS	182
14.5	BRAND COMPARISON	185
14.6	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	186
14.6.1	STARS	186
14.6.2	EMERGING LEADERS	186
14.6.3	PERVASIVE PLAYERS	187
14.6.4	PARTICIPANTS	187
14.6.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	188

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

14.6.5.1	Company footprint	188
14.6.5.2	Region footprint	189
14.6.5.3	Type footprint	189
14.6.5.4	Chemistry footprint	190
14.6.5.5	Functionality footprint	191
14.6.5.6	Applications footprint	191
14.7	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	192
14.7.1	PROGRESSIVE COMPANIES	192
14.7.2	RESPONSIVE COMPANIES	192
14.7.3	DYNAMIC COMPANIES	192
14.7.4	STARTING BLOCKS	192
14.7.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	194
14.7.5.1	Detailed list of key startups/SMEs	194
14.7.5.2	Competitive benchmarking of key startups/SMEs	195
14.8	COMPANY VALUATION AND FINANCIAL METRICS	197
14.9	COMPETITIVE SCENARIO	198
14.9.1	PRODUCT LAUNCHES	198
14.9.2	DEALS	199
14.9.3	EXPANSIONS	201
15	COMPANY PROFILES	205
15.1	KEY PLAYERS	205
15.1.1	COVESTRO AG	205
15.1.1.1	Business overview	205
15.1.1.2	Products/Solutions/Services offered	206
15.1.1.3	Recent developments	207
15.1.1.3.1	Product launches	207
15.1.1.3.2	Deals	207
15.1.1.3.3	Expansions	208
15.1.1.4	MnM view	209
15.1.1.4.1	Right to win	209
15.1.1.4.2	Strategic choices	209
15.1.1.4.3	Weaknesses and competitive threats	209
15.1.2	BASF	210
15.1.2.1	Business overview	210
15.1.2.2	Products/Solutions/Services offered	212
15.1.2.3	Recent developments	212
15.1.2.3.1	Deals	212
15.1.2.3.2	Expansion	213
15.1.2.4	MnM view	213
15.1.2.4.1	Right to win	213
15.1.2.4.2	Strategic choices	214
15.1.2.4.3	Weaknesses & competitive threats	214
15.1.3	DOW	215
15.1.3.1	Business overview	215
15.1.3.2	Products/Solutions/Services offered	216
15.1.3.3	Recent developments	217
15.1.3.3.1	Expansions	217

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 15.1.3.4 MnM view 218
- 15.1.3.4.1 Right to win 218
- 15.1.3.4.2 Strategic choices 218
- 15.1.3.4.3 Weaknesses & competitive threats 218
- 15.1.4 WANHUA 219
- 15.1.4.1 Business overview 219
- 15.1.4.2 Products/Solutions/Services offered 220
- 15.1.4.3 Recent developments 221
- 15.1.4.3.1 Product launches 221
- 15.1.4.3.2 Expansions 221
- 15.1.4.4 MnM view 222
- 15.1.4.4.1 Right to win 222
- 15.1.4.4.2 Strategic choices 222
- 15.1.4.4.3 Weaknesses and competitive threats 222
- 15.1.5 LUBRIZOL 223
- 15.1.5.1 Business overview 223
- 15.1.5.2 Products/Solutions/Services offered 224
- 15.1.5.3 Recent developments 225
- 15.1.5.3.1 Product launches 225
- 15.1.5.4 MnM view 225
- 15.1.5.4.1 Right to win 225
- 15.1.5.4.2 Strategic choices 226
- 15.1.5.4.3 Weaknesses and competitive threats 226
- 15.1.6 MITSUI CHEMICALS, INC. 227
- 15.1.6.1 Business overview 227
- 15.1.6.2 Products/Solutions/Services offered 228
- 15.1.6.3 Recent development 229
- 15.1.6.3.1 Expansions 229
- 15.1.6.4 MnM view 230
- 15.1.7 ALBERDINGK BOLEY GMBH 231
- 15.1.7.1 Business overview 231
- 15.1.7.2 Products/Solutions/Services offered 232
- 15.1.7.3 Recent developments 232
- 15.1.7.3.1 Deals 232
- 15.1.7.4 MnM view 233
- 15.1.8 PERSTORP HOLDING AB (PETRONAS CHEMICALS GROUP) 234
- 15.1.8.1 Business overview 234
- 15.1.8.2 Products/Solutions/Services offered 234
- 15.1.8.3 MnM view 235
- 15.1.9 STAHL HOLDINGS B.V. 236
- 15.1.9.1 Business overview 236
- 15.1.9.2 Products/Solutions/Services offered 237
- 15.1.9.3 Recent developments 238
- 15.1.9.3.1 Expansions 238
- ?
- 15.1.9.4 MnM view 238
- 15.1.10 UBE CORPORATION 240

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

15.1.10.1	Business overview	240
15.1.10.2	Products/Solutions/Services offered	241
15.1.10.3	Recent developments	242
15.1.10.3.1	Deals	242
15.1.10.4	MnM view	242
15.2	OTHER PLAYERS	244
15.2.1	DIC CORPORATION	244
15.2.2	ALLNEX GMBH	245
15.2.3	LAMBERTI S.P.A.	246
15.2.4	POLYNT S.P.A.	247
15.2.5	CHASE CORP.	248
15.2.6	RUDOLF GMBH	249
15.2.7	C. L. HAUTHAWAY & SONS CORP	250
15.2.8	MICHELMAN, INC.	251
15.2.9	NANPAO RESINS CHEMICAL GROUP	252
15.2.10	INCOREZ	253
15.2.11	SNP, INC.	254
15.2.12	TAIWAN PU CORPORATION	255
15.2.13	SIWOPUD	256
15.2.14	VCM POLYURETHANES PVT. LTD	257
15.2.15	KAMSONS POLYMERS LIMITED	258
16	RESEARCH METHODOLOGY	259
16.1	RESEARCH DATA	259
16.1.1	SECONDARY DATA	260
16.1.1.1	Key data from secondary sources	260
16.1.2	PRIMARY DATA	261
16.1.2.1	Key data from primary sources	261
16.1.2.2	Key industry insights	262
16.1.2.3	Breakdown of primary interviews	262
16.2	MARKET SIZE ESTIMATION	263
16.2.1	BOTTOM-UP APPROACH	263
16.2.2	TOP-DOWN APPROACH	264
16.3	DATA TRIANGULATION	264
16.4	RESEARCH ASSUMPTIONS	266
16.5	LIMITATIONS	266
?		
17	APPENDIX	267
17.1	DISCUSSION GUIDE	267
17.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	270
17.3	CUSTOMIZATION OPTIONS	272
17.4	RELATED REPORTS	272
17.5	AUTHOR DETAILS	273

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Polyurethane Dispersions Market By Type (Solvent-Free Polyurethane Dispersions, Low-Solvent Polyurethane Dispersions), By Chemistry (Anionic Polyurethane Dispersions, Cationic Polyurethane Dispersions, Nonionic Polyurethane Dispersions, Self-Crosslinking Polyurethane Dispersions, Hybrid Polyurethane Dispersions), By Functionality [One-Component (1k) Systems, Two-Component (2k) Systems], By Application (Paints & Coatings, Adhesives & Sealants, Leather Manufacturing & Finishing, Textile Finishing), and Region - Global Forecast to 2030

Market Report | 2025-12-01 | 274 pages | MarketsandMarkets

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	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		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.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

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="2026-03-02"/>
		Signature	<input type="text"/>