

# Toluene Diisocyanate Market By Form (2,4 Toluene Diisocyanate, 2,6 Toluene Diisocyanate), By Application (Foams, Coatings, Elastomers, Adhesive and Sealants, Others) : Global Opportunity Analysis and Industry Forecast, 2023-2033

<https://marketpublishers.com/r/T87FF4B9C8CDEN.html>

Date: June 2024

Pages: 300

Price: US\$ 2,655.00 (Single User License)

ID: T87FF4B9C8CDEN

## Abstracts

The global toluene diisocyanate market was valued at \$4.5 billion in 2023, and is projected to reach \$7.3 billion by 2033, growing at a CAGR of 5% from 2024 to 2033.

Toluene diisocyanate (TDI) is an organic compound used mainly in polyurethanes production, including flexible foams, coatings, adhesives, and elastomers. It exists mainly in two isomeric forms, 2, 4-TDI and 2, 6-TDI, which are typically used as a mixture in industrial applications. TDI is a volatile, colourless to pale yellow liquid with a pungent odor. It is highly reactive, particularly with compounds containing active hydrogen atoms such as water, alcohols, and amines, making it crucial in polymer chemistry.

The market for toluene diisocyanate is experiencing growth due to the rise in demand for polyurethane foam. Toluene diisocyanate are the source of polyurethane foams, which find extensive use in the furniture, automotive, and construction sectors. Moreover, technological advancements in TDI production and processing are boosting output, reducing costs, and improving the quality of the finished product. The development of high-yield manufacturing techniques and catalysts is optimizing TDI production, while advancements in separation and purification technologies are boosting product purity. Moreover, automation and control system integration improve safety, reduce downtime, and streamline TDI manufacturing. These advancements are expected to strengthen the supply chain and increase the competitiveness of TDI producers.

However, toxicity of toluene diisocyanate (TDI) presents a significant challenge to the growth of the TDI market. TDI is known to be highly toxic if inhaled, ingested, or absorbed through the skin, posing health risks to workers involved in its production, handling, and use. Contrarily, strategies, such as mergers & acquisitions, partnerships, and collaborations, present lucrative opportunity for the growth of the toluene diisocyanate (TDI) market. For instance, in April 2023, Wanhua Chemical reported that it has got approval from the State Administration of Market Supervision and Administration to acquire shares of Yantai Juli Fine Chemical Co., Ltd. It is a major supplier of toluene diisocyanate in China. Through this transaction, Wanhua Chemical's TDI capacity in China is expected to expand from 35-40% to 45-50%.

### Segmentation Overview

The toluene diisocyanate market is segmented into form, application, and region. By form, the market is classified into 2, 4 toluene diisocyanate and 2, 6 toluene diisocyanate. Depending on the application, it is divided into foams, coatings, elastomers, adhesive & sealants, and others. Region wise the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

### Key Findings

Depending on form, the 2, 6 toluene diisocyanate segment held the highest market share in 2023.

By application, the foams segment accounted for the maximum share in the market in 2023.

Region wise, Asia-Pacific dominated the toluene diisocyanate market in 2023.

### Competitive Analysis

The major players operating in the toluene diisocyanate market include BASF SE, Covestro AG, Dow Inc., Wanhua, Tosoh Corporation, Evonik Industries AG, Tokyo Chemical Industry Co., Cangzhou Dahua Group Co., Ltd., SABIC, and Merck KGaA. Other players in the toluene diisocyanate market include LANXESS, KH Chemicals, Hanwha Solutions Chemical Division., Mitsui Chemicals, Inc., and TSE Industries, Inc. These players have adopted several strategies to maintain their foothold in this competitive market.

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Analysis of raw material in a product (by %)

Manufacturing Capacity

Capital Investment breakdown

Investment Opportunities

Product Benchmarking / Product specification and applications

Scenario Analysis & Growth Trend Comparison

Supply Chain Analysis & Vendor Margins

Upcoming/New Entrant by Regions

Technology Trend Analysis

Global Market Strategy

New Product Development/ Product Matrix of Key Players

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Regulatory Guidelines

Additional company profiles with specific client's interest

Additional country or region analysis- market size and forecast

Average Selling Price Analysis / Price Point Analysis

Expanded list for Company Profiles

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Product Consumption Analysis

## Volume Market Size and Forecast

### Key Market Segments

#### By Form

2,4 Toluene Diisocyanate

2,6 Toluene Diisocyanate

#### By Application

Foams

Coatings

Elastomers

Adhesive and Sealants

Others

#### By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

BASF SE

Covestr%li%AG.

Merck KGaA

SABIC

Dow Inc.

Wanhua

Tosoh Corporation.

Evonik Industries AG

Toky%li%Chemical Industry Co

Cangzhou Dahua Group Co., Ltd.

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