

# **Global Bio-based Isocyanate Market Size Study & Forecast, by Application (Foams, Adhesives & Sealants, Paints & Coatings) and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Bio-based Isocyanate Market is valued at approximately USD 5.75 billion in 2024 and is expected to advance at a promising CAGR of more than 5.90% during the forecast period 2025–2035. Bio-based isocyanates—derived from renewable sources like plant oils, starches, and other biomass—are steadily becoming a pivotal alternative to their petrochemical counterparts. These compounds are chiefly used in the manufacturing of polyurethane materials, including foams, adhesives, sealants, and coatings. Their expanding usage in sustainable product lines stems from increasing environmental regulations, a global push for greener alternatives, and heightened consumer preference for eco-friendly construction and packaging solutions. As industries pivot toward bio-based innovations, the demand for these isocyanates continues to flourish, especially in sectors where sustainability is becoming non-negotiable.

The surge in demand for polyurethane products across diverse end-user industries—ranging from construction and automotive to furniture and packaging—has significantly accelerated the adoption of bio-based isocyanates. Their low VOC (Volatile Organic Compound) emissions and carbon-neutral footprint make them attractive for applications like rigid and flexible foams, industrial adhesives, and decorative coatings. For instance, the global shift toward green buildings and recyclable insulation materials has unlocked new avenues for foam-based bio-isocyanate applications. Moreover, innovations in bio-based feedstocks and enzymatic production technologies have enhanced product performance, expanding the application base. However, challenges such as high production costs, limited commercial-scale facilities, and raw material

inconsistencies continue to hinder the market's full-scale transformation.

Regionally, North America is anticipated to command a significant share of the Bio-based Isocyanate Market by 2025, underpinned by strong environmental legislation, R&D investments, and an increasingly eco-conscious manufacturing base. The United States and Canada, in particular, have witnessed an uptick in sustainable infrastructure projects and bio-based R&D initiatives. Meanwhile, Europe is expected to remain a major contributor to global revenues, supported by regulatory frameworks like REACH and the EU Green Deal. On the other hand, Asia Pacific is projected to witness the fastest growth during the forecast period. Countries such as China, India, and Japan are making swift strides toward bio-economy transitions, propelled by large-scale industrialization, population growth, and tightening environmental policies, all of which foster demand for renewable raw materials and bio-based chemicals.

Major market player included in this report are:

BASF SE

Covestro AG

Asahi Kasei Corporation

Tosoh Corporation

Wanhua Chemical Group Co., Ltd.

Mitsui Chemicals Inc.

Vencorex Holding SA

Huntsman Corporation

Kuraray Co., Ltd.

Dow Inc.

Borealis AG

COIM Group

Purcom Quimica

Synthesia Technology Group

SWISSINSO SA

#### Global Bio-based Isocyanate Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Application:

Foams

Adhesives & Sealants

Paints & Coatings

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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