

# Global MDI, TDI, and Polyurethane Market Size Study & Forecast, by Application and End-Use, and Regional Forecasts 2025-2035

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## Abstracts

The Global MDI, TDI, and Polyurethane Market is valued at approximately USD 93.31 billion in 2024 and is poised to expand at a robust CAGR of 6.20% during the forecast period 2025–2035. The steady shift toward lightweight materials, improved insulation systems, and more sustainable construction techniques continues to fuel demand for polyurethanes across diverse industries. MDI (Methylene Diphenyl Diisocyanate) and TDI (Toluene Diisocyanate), as critical precursors for polyurethane synthesis, play an indispensable role in delivering flexible and rigid foam solutions tailored for energy efficiency, structural strength, and aesthetic versatility. With increased consumer preference for eco-conscious materials and stringent energy codes worldwide, polyurethane's insulation, cushioning, and bonding capabilities make it a material of choice for next-generation product engineering.

The surging demand from the construction, automotive, and furniture sectors has been a key force shaping the polyurethane landscape. As construction booms globally—especially in fast-urbanizing economies—rigid foams are increasingly used for thermal insulation in walls, roofs, and pipelines. Simultaneously, flexible foams dominate furniture, bedding, and vehicle interiors, offering comfort and resilience. Moreover, polyurethane-based adhesives, elastomers, and coatings are proving essential in applications where both durability and aesthetic appeal are critical. For instance, elastomers contribute to superior wear resistance in wheels and rollers, while coatings are heavily used in flooring, automotive paints, and marine finishes. The development of bio-based polyols and low-VOC (volatile organic compound) formulations further signals the industry's pivot toward sustainability and regulatory compliance.

Regionally, North America is anticipated to retain a significant share of the market through 2035, driven by advanced manufacturing capabilities, ongoing retrofitting of insulation systems, and steady growth in automotive production. Europe follows closely, backed by energy-efficiency mandates and a matured furniture market. The Asia Pacific region, however, is expected to be the fastest-growing market, spurred by rapid industrialization, infrastructure investments, and expanding middle-class consumer bases in China, India, and Southeast Asia. Initiatives to replace conventional materials with lighter, more durable polyurethane-based alternatives are gaining traction across sectors such as electronics, packaging, and appliances. Meanwhile, Latin America and the Middle East & Africa are exhibiting promising growth patterns, primarily due to infrastructural development, increasing urban migration, and the rise of the construction and automotive sectors.

Major market player included in this report are:

BASF SE

Covestro AG

Huntsman Corporation

Dow Inc.

Wanhua Chemical Group Co., Ltd.

Mitsui Chemicals, Inc.

Tosoh Corporation

Chemtura Corporation (LANXESS)

Woodbridge Foam Corporation

Recticel NV

FoamPartner Group

Carpenter Co.

INOAC Corporation

UBE Industries, Ltd.

Rogers Corporation

## Global MDI, TDI, and Polyurethane 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:

Flexible Foams

Rigid Foams

Paints & Coatings

Elastomers

Adhesives & Sealants

By End-Use:

Construction

Furniture & Interiors

Electronics & Appliances

Automotive

Footwear

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.

## Contents

### **CHAPTER 1. GLOBAL MDI, TDI, AND POLYURETHANE MARKET REPORT SCOPE & METHODOLOGY**

- 1.1. Research Objective
- 1.2. Research Methodology
  - 1.2.1. Forecast Model
  - 1.2.2. Desk Research
  - 1.2.3. Top Down and Bottom-Up Approach
- 1.3. Research Attributes
- 1.4. Scope of the Study
  - 1.4.1. Market Definition
  - 1.4.2. Market Segmentation
- 1.5. Research Assumption
  - 1.5.1. Inclusion & Exclusion
  - 1.5.2. Limitations
  - 1.5.3. Years Considered for the Study

### **CHAPTER 2. EXECUTIVE SUMMARY**

- 2.1. CEO/CXO Standpoint
- 2.2. Strategic Insights
- 2.3. ESG Analysis
- 2.4. Key Findings

### **CHAPTER 3. GLOBAL MDI, TDI, AND POLYURETHANE MARKET FORCES ANALYSIS**

- 3.1. Market Forces Shaping The Global MDI, TDI, and Polyurethane Market (2024-2035)
- 3.2. Drivers
  - 3.2.1. Rising demand for energy-efficient building materials
  - 3.2.2. Rapid industrialization and infrastructure development
- 3.3. Restraints
  - 3.3.1. Volatility in raw material prices
  - 3.3.2. Environmental and health regulations on isocyanates
- 3.4. Opportunities
  - 3.4.1. Growing adoption of bio-based polyurethanes

3.4.2. Increasing applications in emerging markets

## **CHAPTER 4. GLOBAL MDI, TDI, AND POLYURETHANE INDUSTRY ANALYSIS**

- 4.1. Porter's 5 Forces Model
  - 4.1.1. Bargaining Power of Buyer
  - 4.1.2. Bargaining Power of Supplier
  - 4.1.3. Threat of New Entrants
  - 4.1.4. Threat of Substitutes
  - 4.1.5. Competitive Rivalry
- 4.2. Porter's 5 Force Forecast Model (2024-2035)
- 4.3. PESTEL Analysis
  - 4.3.1. Political
  - 4.3.2. Economical
  - 4.3.3. Social
  - 4.3.4. Technological
  - 4.3.5. Environmental
  - 4.3.6. Legal
- 4.4. Top Investment Opportunities
- 4.5. Top Winning Strategies (2025)
- 4.6. Market Share Analysis (2024-2025)
- 4.7. Global Pricing Analysis and Trends 2025
- 4.8. Analyst Recommendation & Conclusion

## **CHAPTER 5. GLOBAL MDI, TDI, AND POLYURETHANE MARKET SIZE & FORECASTS BY APPLICATION 2025–2035**

- 5.1. Market Overview
- 5.2. Global Market Performance - Potential Analysis (2025)
- 5.3. Flexible Foams
  - 5.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 5.3.2. Market Size Analysis, by Region, 2025-2035
- 5.4. Rigid Foams
  - 5.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 5.4.2. Market Size Analysis, by Region, 2025-2035
- 5.5. Paints & Coatings
  - 5.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 5.5.2. Market Size Analysis, by Region, 2025-2035
- 5.6. Elastomers

- 5.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
- 5.6.2. Market Size Analysis, by Region, 2025-2035
- 5.7. Adhesives & Sealants
  - 5.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 5.7.2. Market Size Analysis, by Region, 2025-2035

## **CHAPTER 6. GLOBAL MDI, TDI, AND POLYURETHANE MARKET SIZE & FORECASTS BY END-USE 2025–2035**

- 6.1. Market Overview
- 6.2. Global Market Performance - Potential Analysis (2025)
- 6.3. Construction
  - 6.3.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 6.3.2. Market Size Analysis, by Region, 2025-2035
- 6.4. Furniture & Interiors
  - 6.4.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 6.4.2. Market Size Analysis, by Region, 2025-2035
- 6.5. Electronics & Appliances
  - 6.5.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 6.5.2. Market Size Analysis, by Region, 2025-2035
- 6.6. Automotive
  - 6.6.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 6.6.2. Market Size Analysis, by Region, 2025-2035
- 6.7. Footwear
  - 6.7.1. Top Countries Breakdown Estimates & Forecasts, 2024-2035
  - 6.7.2. Market Size Analysis, by Region, 2025-2035

## **CHAPTER 7. GLOBAL MDI, TDI, AND POLYURETHANE MARKET SIZE & FORECASTS BY REGION 2025–2035**

- 7.1. Regional Market Snapshot
- 7.2. Top Leading & Emerging Countries
- 7.3. North America
  - 7.3.1. U.S.
  - 7.3.2. Canada
- 7.4. Europe
  - 7.4.1. UK
  - 7.4.2. Germany
  - 7.4.3. France

- 7.4.4. Spain
- 7.4.5. Italy
- 7.4.6. Rest of Europe
- 7.5. Asia Pacific
  - 7.5.1. China
  - 7.5.2. India
  - 7.5.3. Japan
  - 7.5.4. Australia
  - 7.5.5. South Korea
  - 7.5.6. Rest of Asia Pacific
- 7.6. Latin America
  - 7.6.1. Brazil
  - 7.6.2. Mexico
- 7.7. Middle East and Africa
  - 7.7.1. UAE
  - 7.7.2. Saudi Arabia
  - 7.7.3. South Africa
  - 7.7.4. Rest of Middle East & Africa

## **CHAPTER 8. COMPETITIVE INTELLIGENCE**

- 8.1. Top Market Strategies
- 8.2. BASF SE
  - 8.2.1. Company Overview
  - 8.2.2. Key Executives
  - 8.2.3. Company Snapshot
  - 8.2.4. Financial Performance (Subject to Data Availability)
  - 8.2.5. Product/Services Port
  - 8.2.6. Recent Development
  - 8.2.7. Market Strategies
  - 8.2.8. SWOT Analysis
- 8.3. Covestro AG
- 8.4. Huntsman Corporation
- 8.5. Dow Inc.
- 8.6. Wanhua Chemical Group Co., Ltd.
- 8.7. Mitsui Chemicals, Inc.
- 8.8. Tosoh Corporation
- 8.9. Chemtura Corporation (LANXESS)
- 8.10. Woodbridge Foam Corporation

- 8.11. Recticel NV
- 8.12. FoamPartner Group
- 8.13. Carpenter Co.
- 8.14. INOAC Corporation
- 8.15. UBE Industries, Ltd.
- 8.16. Rogers Corporation

## List Of Tables

### LIST OF TABLES

- Table 1. Global MDI, TDI, and Polyurethane Market, Report Scope
- Table 2. Global Market Estimates & Forecasts by Region 2024–2035
- Table 3. Global Market Estimates & Forecasts by Application 2024–2035
- Table 4. Global Market Estimates & Forecasts by End-Use 2024–2035
- Table 5. U.S. Market Estimates & Forecasts, 2024–2035
- Table 6. Canada Market Estimates & Forecasts, 2024–2035
- Table 7. UK Market Estimates & Forecasts, 2024–2035
- Table 8. Germany Market Estimates & Forecasts, 2024–2035
- Table 9. France Market Estimates & Forecasts, 2024–2035
- Table 10. Spain Market Estimates & Forecasts, 2024–2035
- Table 11. Italy Market Estimates & Forecasts, 2024–2035
- Table 12. Rest of Europe Market Estimates & Forecasts, 2024–2035
- Table 13. China Market Estimates & Forecasts, 2024–2035
- Table 14. India Market Estimates & Forecasts, 2024–2035
- Table 15. Japan Market Estimates & Forecasts, 2024–2035
- Table 16. Australia Market Estimates & Forecasts, 2024–2035
- Table 17. South Korea Market Estimates & Forecasts, 2024–2035
- Table 18. Rest of Asia Pacific Market Estimates & Forecasts, 2024–2035
- Table 19. Brazil Market Estimates & Forecasts, 2024–2035
- Table 20. Mexico Market Estimates & Forecasts, 2024–2035
- Table 21. UAE Market Estimates & Forecasts, 2024–2035
- Table 22. Saudi Arabia Market Estimates & Forecasts, 2024–2035
- Table 23. South Africa Market Estimates & Forecasts, 2024–2035
- Table 24. Rest of Middle East & Africa Market Estimates & Forecasts, 2024–2035

## List Of Figures

### LIST OF FIGURES

- Figure 1. Global MDI, TDI, and Polyurethane Market, Research Methodology
- Figure 2. Market Estimation Techniques
- Figure 3. Global Market Size Estimates & Forecast Methods
- Figure 4. Key Market Trends 2025
- Figure 5. Market Growth Prospects 2024–2035
- Figure 6. Porter's Five Forces Model
- Figure 7. PESTEL Analysis
- Figure 8. Value Chain Analysis
- Figure 9. Market by Application, 2025 & 2035
- Figure 10. Market by End-Use, 2025 & 2035
- Figure 11. Market by Region, 2025 & 2035
- Figure 12. North America Market Outlook, 2025 & 2035
- Figure 13. Europe Market Outlook, 2025 & 2035
- Figure 14. Asia Pacific Market Outlook, 2025 & 2035
- Figure 15. Latin America Market Outlook, 2025 & 2035
- Figure 16. Middle East & Africa Market Outlook, 2025 & 2035
- Figure 17. Company Market Share Analysis, 2025

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