

Global Methyl Di-p-phenylene Isocyanate Market Size Study, by Form (Pure MDI, Polymeric MDI, and Modified MDI), by Application (Rigid Foam, Flexible Foam), by End-Use Industry (Building & Construction, Automotive, Electrical & Electronics, Furnishing & Interiors, Packaging, and Footwear), and Regional Forecasts 2022-2032

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Abstracts

The Global Methyl Di-p-phenylene Isocyanate (MDI) Market, valued at approximately USD 26.51 billion in 2023, is projected to expand at a CAGR of 5.20% over the forecast period 2024-2032. MDI is a critical raw material in the production of polyurethanes, which are extensively utilized across industries such as construction, automotive, furniture, and electronics. The rising demand for energy-efficient insulation materials, lightweight automotive components, and durable packaging solutions is fueling market growth.

With advancements in polymer technology and increasing sustainability initiatives, the industry is witnessing a shift towards low-emission and bio-based MDI variants. The push for environmentally friendly polyurethane foams is driving investments in green chemistry and alternative feedstocks. Additionally, the rising adoption of MDI-based rigid and flexible foams in thermal insulation, cushioning materials, and protective coatings is contributing to market expansion.

However, raw material price volatility, especially related to benzene and other petrochemical derivatives, poses a significant challenge. Additionally, stringent environmental and regulatory restrictions on isocyanate emissions are compelling manufacturers to develop safer and more sustainable production techniques. Industry

leaders are increasingly investing in waste minimization, process automation, and advanced recycling technologies to align with evolving regulatory norms.

Regionally, Asia-Pacific dominates the MDI market, with China, India, and Japan being major producers and consumers due to rapid urbanization, increasing construction activities, and growing automotive production. North America and Europe are witnessing steady growth, supported by strict energy-efficiency regulations and a focus on green buildings. Meanwhile, Latin America and the Middle East & Africa are experiencing rising demand for MDI-based polyurethane solutions in infrastructure development and consumer goods manufacturing.

Major Market Players Included in This Report:

BASF SE

The Dow Chemical Company

Wanhua Chemical Group Co., Ltd.

Covestro AG

Huntsman Corporation

Mitsubishi Chemical Corporation

LANXESS AG

Tosoh Corporation

Kumho Mitsui Chemicals Inc.

SKC Company Limited

Yantai Wanhua Polyurethane Co., Ltd.

Hanwha Chemical Corporation

Sadara Chemical Company

Shandong Bluestar Dongda Chemical Co., Ltd.

Sumitomo Chemical Co., Ltd.

The Detailed Segments and Sub-Segments of the Market are Explained Below:

By Form:

Pure MDI

Polymeric MDI

Modified MDI

By Application:

Rigid Foam

Flexible Foam

By End-Use Industry:

Building & Construction

Automotive

Electrical & Electronics

Furnishing & Interiors

Packaging

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

Rest of Latin America

Middle East & Africa:

Saudi Arabia

South Africa

Rest of Middle East & Africa

Years Considered for the Study:

Historical Year: 2022

Base Year: 2023

Forecast Period: 2024 to 2032

Key Takeaways:

Market Estimates & Forecasts for 10 years (2022-2032).

Annualized revenue and regional-level analysis for each market segment.

Comprehensive assessment of geographical landscape with country-level insights.

Competitive landscape analysis with profiles of major industry players.

Insights into strategic initiatives, investment trends, and business expansions.

Demand-side and supply-side market trends shaping the future outlook.

Contents

CHAPTER 1. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET EXECUTIVE SUMMARY

- 1.1. Global Methyl Di-p-phenylene Isocyanate Market Size & Forecast (2022- 2032)
- 1.2. Regional Summary
- 1.3. Segmental Summary
 - 1.3.1. {By Form}
 - 1.3.2. {By Application}
 - 1.3.3. {By End-Use Industry}
- 1.4. Key Trends
- 1.5. Recession Impact
- 1.6. Analyst Recommendation & Conclusion

CHAPTER 2. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET DEFINITION AND RESEARCH ASSUMPTIONS

- 2.1. Research Objective
- 2.2. Market Definition
- 2.3. Research Assumptions
 - 2.3.1. Inclusion & Exclusion
 - 2.3.2. Limitations
 - 2.3.3. Supply Side Analysis
 - 2.3.3.1. Availability
 - 2.3.3.2. Infrastructure
 - 2.3.3.3. Regulatory Environment
 - 2.3.3.4. Market Competition
 - 2.3.3.5. Economic Viability (Consumer's Perspective)
 - 2.3.4. Demand Side Analysis
 - 2.3.4.1. Regulatory Frameworks
 - 2.3.4.2. Technological Advancements
 - 2.3.4.3. Environmental Considerations
 - 2.3.4.4. Consumer Awareness & Acceptance
- 2.4. Estimation Methodology
- 2.5. Years Considered for the Study
- 2.6. Currency Conversion Rates

CHAPTER 3. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET

Global Methyl Di-p-phenylene Isocyanate Market Size Study, by Form (Pure MDI, Polymeric MDI, and Modified MDI)...

DYNAMICS

3.1. Market Drivers

3.1.1. Increasing demand for energy-efficient insulation and lightweight automotive components

3.1.2. Advancements in polymer technology and sustainable MDI production

3.1.3. Expansion of polyurethane applications in building & construction and consumer goods

3.2. Market Challenges

3.2.1. Volatility in raw material prices, particularly benzene derivatives

3.2.2. Stringent environmental and regulatory restrictions on isocyanate emissions

3.3. Market Opportunities

3.3.1. Growth in green chemistry and bio-based MDI variants

3.3.2. Emerging market expansion driven by rapid urbanization and industrialization

3.3.3. Investments in process automation and recycling technologies

CHAPTER 4. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET INDUSTRY ANALYSIS

4.1. Porter's 5 Force Model

4.1.1. Bargaining Power of Suppliers

4.1.2. Bargaining Power of Buyers

4.1.3. Threat of New Entrants

4.1.4. Threat of Substitutes

4.1.5. Competitive Rivalry

4.1.6. Futuristic Approach to Porter's 5 Force Model

4.1.7. Porter's 5 Force Impact Analysis

4.2. PESTEL Analysis

4.2.1. Political

4.2.2. Economical

4.2.3. Social

4.2.4. Technological

4.2.5. Environmental

4.2.6. Legal

4.3. Top Investment Opportunity

4.4. Top Winning Strategies

4.5. Disruptive Trends

4.6. Industry Expert Perspective

4.7. Analyst Recommendation & Conclusion

CHAPTER 5. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET SIZE & FORECASTS BY FORM 2022-2032

5.1. Segment Dashboard

5.2. Global Methyl Di-p-phenylene Isocyanate Market: {Form} Revenue Trend Analysis, 2022 & 2032 (USD Million/Billion)

5.2.1. Pure MDI

5.2.2. Polymeric MDI

5.2.3. Modified MDI

CHAPTER 6. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET SIZE & FORECASTS BY APPLICATION 2022-2032

6.1. Segment Dashboard

6.2. Global Methyl Di-p-phenylene Isocyanate Market: {Application} Revenue Trend Analysis, 2022 & 2032 (USD Million/Billion)

6.2.1. Rigid Foam

6.2.2. Flexible Foam

CHAPTER 7. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET SIZE & FORECASTS BY END-USE INDUSTRY 2022-2032

7.1. Segment Dashboard

7.2. Global Methyl Di-p-phenylene Isocyanate Market: {End-Use Industry} Revenue Trend Analysis, 2022 & 2032 (USD Million/Billion)

7.2.1. Building & Construction

7.2.2. Automotive

7.2.3. Electrical & Electronics

7.2.4. Furnishing & Interiors

7.2.5. Packaging

7.2.6. Footwear

CHAPTER 8. GLOBAL METHYL DI-P-PHENYLENE ISOCYANATE MARKET SIZE & FORECASTS BY REGION 2022-2032

8.1. North America MDI Market

8.1.1. U.S. MDI Market

8.1.1.1. {Form} breakdown size & forecasts, 2022-2032

- 8.1.1.2. {End-Use Industry} breakdown size & forecasts, 2022-2032
- 8.1.2. Canada MDI Market
- 8.2. Europe MDI Market
 - 8.2.1. UK MDI Market
 - 8.2.2. Germany MDI Market
 - 8.2.3. France MDI Market
 - 8.2.4. Spain MDI Market
 - 8.2.5. Italy MDI Market
 - 8.2.6. Rest of Europe MDI Market
- 8.3. Asia-Pacific MDI Market
 - 8.3.1. China MDI Market
 - 8.3.2. India MDI Market
 - 8.3.3. Japan MDI Market
 - 8.3.4. Australia MDI Market
 - 8.3.5. South Korea MDI Market
 - 8.3.6. Rest of Asia-Pacific MDI Market
- 8.4. Latin America MDI Market
 - 8.4.1. Brazil MDI Market
 - 8.4.2. Mexico MDI Market
 - 8.4.3. Rest of Latin America MDI Market
- 8.5. Middle East & Africa MDI Market
 - 8.5.1. Saudi Arabia MDI Market
 - 8.5.2. South Africa MDI Market
 - 8.5.3. Rest of Middle East & Africa MDI Market

CHAPTER 9. COMPETITIVE INTELLIGENCE

- 9.1. Key Company SWOT Analysis
 - 9.1.1. BASF SE
 - 9.1.2. The Dow Chemical Company
 - 9.1.3. Wanhua Chemical Group Co., Ltd.
- 9.2. Top Market Strategies
- 9.3. Company Profiles
 - 9.3.1. BASF SE
 - 9.3.1.1. Key Information
 - 9.3.1.2. Overview
 - 9.3.1.3. Financial (Subject to Data Availability)
 - 9.3.1.4. Product Summary
 - 9.3.1.5. Market Strategies

- 9.3.2. Covestro AG
- 9.3.3. Huntsman Corporation
- 9.3.4. Mitsubishi Chemical Corporation
- 9.3.5. LANXESS AG
- 9.3.6. Tosoh Corporation
- 9.3.7. Kumho Mitsui Chemicals Inc.
- 9.3.8. SKC Company Limited
- 9.3.9. Yantai Wanhua Polyurethane Co., Ltd.
- 9.3.10. Hanwha Chemical Corporation
- 9.3.11. Sadara Chemical Company
- 9.3.12. Shandong Bluestar Dongda Chemical Co., Ltd.
- 9.3.13. Sumitomo Chemical Co., Ltd.
- 9.4. (Additional Company Profiles as applicable)

CHAPTER 10. RESEARCH PROCESS

- 10.1. Research Process
 - 10.1.1. Data Mining
 - 10.1.2. Analysis
 - 10.1.3. Market Estimation
 - 10.1.4. Validation
 - 10.1.5. Publishing
- 10.2. Research Attributes

List Of Tables

LIST OF TABLES

TABLE 1. Global Methyl Di-p-phenylene Isocyanate Market, report scope

TABLE 2. Global Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by Region 2022-2032 (USD Million/Billion)

TABLE 3. Global Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by Form 2022-2032 (USD Million/Billion)

TABLE 4. Global Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by Application 2022-2032 (USD Million/Billion)

TABLE 5. Global Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by End-Use Industry 2022-2032 (USD Million/Billion)

TABLE 6. Global Methyl Di-p-phenylene Isocyanate Market by segment, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 7. Global Methyl Di-p-phenylene Isocyanate Market by region, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 8. Global Methyl Di-p-phenylene Isocyanate Market by segment, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 9. Global Methyl Di-p-phenylene Isocyanate Market by region, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 10. Global Methyl Di-p-phenylene Isocyanate Market by segment, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 11. Global Methyl Di-p-phenylene Isocyanate Market by region, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 12. Global Methyl Di-p-phenylene Isocyanate Market by segment, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 13. Global Methyl Di-p-phenylene Isocyanate Market by region, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 14. Global Methyl Di-p-phenylene Isocyanate Market by segment, estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 15. U.S. Methyl Di-p-phenylene Isocyanate Market estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 16. U.S. Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by segment 2022-2032 (USD Million/Billion)

TABLE 17. U.S. Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by segment 2022-2032 (USD Million/Billion)

TABLE 18. Canada Methyl Di-p-phenylene Isocyanate Market estimates & forecasts, 2022-2032 (USD Million/Billion)

TABLE 19. Canada Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by segment 2022-2032 (USD Million/Billion)

TABLE 20. Canada Methyl Di-p-phenylene Isocyanate Market estimates & forecasts by segment 2022-2032 (USD Million/Billion)

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This list is not complete; the final report contains more than 100 tables. The list may be updated in the final deliverable.

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