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Global 2K Non-Isocyanate Resin Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global 2K Non-Isocyanate Resin market size is expected to reach $ 324 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

Non-Isocyanate 2K Resin is two-component, isocyanate-free? for coatings, fast dry, high gloss, good outdoor durability with good mechanical properties. For industrial paints, baking and repair systems. 2K Non-Isocyanate Resin system provides much faster dry versus a standard two-component isocyanate primer system without the negative health and safety issues associated with isocyanates.

Key Findings

> Global production reached 35,000 tons in 2025, indicating established commercialization beyond niche laboratory-scale applications

The global average selling price reached US$6,320 per ton in 2025

Commercial technologies include acrylic-epoxy, polyester-epoxy, Michael Addition and silane or polysiloxane crosslinking systems

Industrial and protective coatings remain a major commercialization field, complemented by OEM and architectural coating opportunities

Market Trends

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The 2K Non-Isocyanate Resin market is evolving from individual specialty formulations toward diversified technology platforms capable of addressing a broader portion of the high-performance coatings market. Product development is increasingly focused on achieving the performance balance historically associated with 2K polyurethane coatings while improving occupational safety, VOC performance and process efficiency. High-solids technology remains important because it can reduce solvent emissions without fundamentally changing established industrial coating processes, while waterborne NISO technology is emerging as another development direction. Allnex has developed ACURE around Real Michael Addition chemistry as a high-solids, isocyanate-free 2K platform characterized by rapid curing and extended pot life and has subsequently expanded the technology into waterborne ACURE AQ systems. Acrylic-epoxy systems are also advancing through higher-solids formulations and improved exterior durability, while polyester-epoxy systems continue to provide robust protective-coating performance. Silane-functional and epoxy-polysiloxane technologies broaden the market toward systems combining chemical resistance, weatherability and scratch resistance. Wacker Chemie has demonstrated isocyanate-free two-component epoxy amino polysiloxane coatings with low-VOC formulation capability, while Evonik Industries continues to develop silane-based NISO crosslinkers that can be combined with acrylic polyols in 2K formulations. The long-term industry direction is therefore shifting from simply removing isocyanates toward optimizing the complete balance of cure speed, pot life, coating appearance, weathering performance, chemical resistance and formulation economics.

Market Dynamics

Drivers

Occupational health and chemical-handling requirements are a major structural driver for 2K Non-Isocyanate Resin. The EU REACH restriction requires industrial and professional users of diisocyanates at a combined concentration of 0.1% by weight or above to complete appropriate safe-use training before use, with the requirement applying since August 24, 2023. This requirement increases the operational burden associated with conventional isocyanate-containing 2K coatings, particularly in applications involving spraying, field maintenance and frequent manual mixing. At the same time, industrial coating users continue to require rapid curing, high hardness, chemical resistance, outdoor durability and high-quality appearance. NISO systems are therefore gaining relevance because they address chemical-safety objectives while preserving the two-component reactive curing concept familiar to industrial coating

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formulators and applicators. Regulatory pressure is reinforced by demand for lower-VOC, high-solids and waterborne coatings, creating a broader technology transition in which non-isocyanate curing can be combined with solvent reduction and lower-temperature processing.

Restraints

The principal restraints are formulation complexity, customer qualification requirements and competition from the highly mature 2K polyurethane supply chain. Although the 2025 average selling price of 2K Non-Isocyanate Resin was US$6,320 per ton, economic competitiveness must be evaluated at the complete coating-system level because different NISO chemistries require different functional resins, crosslinkers, catalysts and formulation adjustments. Conventional polyurethane coatings benefit from decades of formulation experience, widespread raw-material availability, established coating specifications and predictable performance across a wide range of substrates. NISO alternatives must simultaneously satisfy cure speed, pot life, gloss, hardness, flexibility, adhesion, weatherability, chemical resistance and corrosion-protection requirements. The need to optimize several parameters at the same time can extend formulation and OEM qualification cycles. In addition, different NISO mechanisms are not directly interchangeable, meaning coating manufacturers may need separate formulation expertise for acrylic-epoxy, polyester-epoxy, Michael Addition and silane-based platforms.

Opportunities

The most attractive opportunities are concentrated in applications where occupational safety, production throughput, VOC reduction or coating-system simplification provides clear economic value. Industrial maintenance and protective coatings are particularly suitable because rapid ambient curing can shorten return-to-service time, while strong chemical and weather resistance supports long service intervals. Arkema's commercial NISO acrylic systems are positioned for protective coatings, transportation equipment and high-quality maintenance finishes, demonstrating the relevance of this chemistry to demanding industrial applications. OEM coatings provide additional opportunities where lower-temperature curing, faster handling and reduced dependence on isocyanate hardeners can improve production conditions. Waterborne NISO technology represents another significant development opportunity because it addresses both isocyanate exposure and solvent emissions. Allnex's extension of ACURE into waterborne 2K NISO technology illustrates this transition. Architectural opportunities are expected to be

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concentrated in higher-performance applications such as professional metal coatings, flooring and protective concrete coatings rather than conventional low-cost decorative paint. Continued improvements in catalyst design, resin functionality and high-solids performance could further increase the addressable market.

Challenges

A major industry challenge is reproducing the unusually broad performance envelope of conventional 2K polyurethane coatings through alternative reaction mechanisms. Rapid curing can reduce application time but may shorten workable pot life, while longer pot life may delay hardness development unless reaction kinetics are carefully controlled. Michael Addition platforms require precise matching of functional donors, acceptors and catalysts, while acrylic-epoxy and polyester-epoxy systems require optimization of acid or other reactive functionality, epoxy equivalent balance and formulation conditions. Silane-based systems introduce another curing mechanism with different moisture sensitivity and reaction behavior. End users also evaluate compatibility with pigments, fillers, additives, substrates, primers and application equipment, meaning resin performance alone does not determine commercial success. Another challenge is technology fragmentation: because the market includes several fundamentally different chemical platforms, standardization remains limited and each supplier must build application data and customer confidence around its individual system. As adoption expands into OEM production, long-term weathering, repairability, process consistency and supply reliability will become increasingly important qualification criteria.

Industry Chain Analysis

The upstream industry chain includes functional acrylic monomers, polyester intermediates, polyols, epoxy resins and epoxy-functional raw materials, multifunctional acrylates, malonate-functional intermediates, silanes, catalysts, solvents, additives and waterborne formulation materials. Midstream suppliers design functional binders and crosslinking packages using acrylic, polyester, epoxy, Michael Addition or silane/polysiloxane chemistry. The principal value creation lies in molecular design and control of crosslinking kinetics, particularly the adjustment of resin functionality, molecular weight, equivalent weight, viscosity, catalyst response and compatibility to achieve the required balance between storage stability, pot life, drying speed and final film performance. Polynt's AROFLINT platform is specifically positioned as a 2K-NISO polyester-epoxy system for durable protective coatings, while Allnex's ACURE platform

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uses Michael Addition chemistry as a distinct non-isocyanate route. Downstream coating manufacturers combine the resin systems with pigments, fillers and performance additives and formulate separate components that are mixed before application. Industrial and protective coating companies, architectural coating manufacturers and OEM coating formulators then qualify the final systems according to substrate, environmental exposure, cure conditions and service requirements. Technical service, starting formulations and customer-specific application development therefore constitute an important part of industry-chain value creation.

Segment Insights

Non-Isocyanate 2K Acrylic Resins represent an important segment because acrylic chemistry provides a strong balance of gloss, color retention, exterior durability, hardness and adhesion required by high-performance topcoats. Commercial systems commonly use acid-functional or multifunctional acrylic binders with epoxy-functional crosslinking components. Arkema's SYNOCURE portfolio demonstrates this structure through acrylic resins and epoxy-acrylic curing agents designed for isocyanate-free 2K industrial systems, with individual products positioned for protective coatings, transportation equipment, maintenance finishes and direct-to-metal applications. This segment has opportunities in high-solids formulations and applications requiring a combination of appearance and outdoor performance.

Non-Isocyanate 2K Polyester Resins provide greater flexibility in backbone design and can support protective coatings, high-solids formulations and rapid ambient-cure systems. Polyester-epoxy chemistry is a recognized commercial route, represented by Polynt's AROFLINT platform, while malonate-functional polyester resins are also used as donor components in Allnex's Michael Addition technology. The Others category captures important alternative technologies that do not fit cleanly into acrylic or conventional polyester-epoxy classification, including silane-functional crosslinkers and epoxy-polysiloxane systems. Evonik Industries' VESTANAT platform can form 2K NISO systems with compatible polyols, while Wacker Chemie's SILRES technology provides an epoxy amino polysiloxane route designed to combine weathering resistance with epoxy-like adhesion and barrier performance. The market therefore remains technologically diversified rather than converging on one dominant crosslinking mechanism.

Downstream Market Opportunities

Industrial and protective coatings are a major opportunity because end users place high

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value on fast return to service, corrosion protection, chemical resistance, mechanical durability and professional application safety. Heavy-duty equipment, infrastructure, transportation equipment, agricultural machinery and maintenance coatings can benefit from NISO systems capable of ambient curing and high-solids formulation. OEM coatings offer another attractive field where controlled curing, production-line productivity and occupational exposure management are important purchasing criteria, although qualification requirements are generally more stringent. Architectural coatings provide selective growth opportunities in high-performance metal, concrete and flooring systems where two-component reactive curing provides meaningful durability advantages. The broader downstream opportunity is not limited to direct substitution of existing polyurethane formulations: NISO systems can also create value where longer pot life, reduced paint waste, lower curing temperature or higher film build changes the economics of the complete coating process. Allnex identifies fast drying, extended pot life and lower-temperature curing as key benefits of its ACURE platform, illustrating how process economics can support adoption beyond chemical-safety considerations alone.

Regional Insights

Europe represents one of the most important regions for adoption because chemical-safety regulation creates a clear incentive to evaluate alternatives to conventional diisocyanate curing. The EU requirement for training before industrial or professional use of mixtures containing at least 0.1% diisocyanates increases the attractiveness of NISO technologies in professional coating applications. Europe also has a strong base of industrial coating, protective coating and specialty resin producers, supporting development across acrylic-epoxy, polyester-epoxy, Michael Addition and silane technologies. The region's continued focus on lower-VOC formulations further favors integration of NISO curing with high-solids and waterborne platforms.

North America is an important application and commercialization region, supported by industrial maintenance, protective coatings, transportation, flooring and general industrial coatings. High productivity requirements and demand for low-VOC high-performance systems provide a basis for further adoption of both solventborne high-solids and emerging waterborne NISO technologies. Asia-Pacific has substantial longer-term potential because of its large OEM and industrial coatings manufacturing base. Adoption is expected to expand as multinational coating specifications, occupational-safety requirements and VOC standards continue to influence regional formulations. Competition in Asia-Pacific is also likely to become increasingly sensitive to cost-performance balance and localized supply, favoring technologies that can achieve

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comparable coating performance without substantial changes to existing application equipment or production processes.

Competitive Landscape Analysis

The competitive landscape is characterized by differentiated chemical platforms rather than standardized resin products. Allnex has established ACURE as a dedicated non-isocyanate 2K platform based on Real Michael Addition chemistry, with high-solids technology and an expanding waterborne ACURE AQ portfolio emphasizing rapid cure and extended pot life. Arkema participates through a broad SYNOCURE NISO acrylic portfolio using acid-functional or multifunctional acrylic resins and epoxy-acrylic curing agents, with products targeting industrial, protective, transportation and maintenance coatings. Polynt differentiates through AROFLINT polyester-epoxy 2K-NISO chemistry for durable protective coatings. Wacker Chemie addresses the market through epoxy-polysiloxane technology, offering an isocyanate-free route for weather-resistant protective coating systems. Evonik Industries develops VESTANAT silane-functional NISO technology for scratch- and chemical-resistant coatings, including 2K formulations with compatible acrylic or other polyol binders. Helios Resins maintains broad acrylic and polyester resin capabilities for industrial coating formulations, including extensive experience in fast-drying and long-pot-life 2K resin design. Competitive differentiation increasingly depends on the ability to combine isocyanate-free curing with practical pot life, fast hardness development, high solids or waterborne capability, exterior durability, chemical resistance and compatibility with established industrial coating processes.

Report Scope

This report studies the global 2K Non-Isocyanate Resin production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 2K Non-Isocyanate Resin and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 2K Non-Isocyanate Resin that contribute to its increasing demand across many markets.

Highlights and key features of the study

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Global 2K Non-Isocyanate Resin total production and demand, 2021-2032, (Tons)

Global 2K Non-Isocyanate Resin total production value, 2021-2032, (USD Million)

Global 2K Non-Isocyanate Resin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global 2K Non-Isocyanate Resin consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: 2K Non-Isocyanate Resin domestic production, consumption, key domestic manufacturers and share

Global 2K Non-Isocyanate Resin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global 2K Non-Isocyanate Resin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global 2K Non-Isocyanate Resin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global 2K Non-Isocyanate Resin market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Allnex, Arkema, Polynt, Wacker Chemie, Evonik Industries, Helios Resins, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 2K Non-Isocyanate Resin market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 2K Non-Isocyanate Resin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global 2K Non-Isocyanate Resin Market, Segmentation by Type:

Non-Isocyanate 2K Acrylic Resins

Non-Isocyanate 2K Polyester Resins

Others

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Global 2K Non-Isocyanate Resin Market, Segmentation by Dispersant:

Solvent-based

Water-based

Global 2K Non-Isocyanate Resin Market, Segmentation by Solid Content:

Solid Content <60%

Solid Content 60%–80%

Solid Content 80%–99%

Solid Content >99%

Global 2K Non-Isocyanate Resin Market, Segmentation by Application:

Industrial and Protective Coatings

Architectural Coatings

OEM Coatings

Companies Profiled:

Allnex

Arkema

Polynt

Wacker Chemie

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Evonik Industries

Helios Resins

Key Questions Answered

1. How big is the global 2K Non-Isocyanate Resin market?
2. What is the demand of the global 2K Non-Isocyanate Resin market?
3. What is the year over year growth of the global 2K Non-Isocyanate Resin market?
4. What is the total value of the global 2K Non-Isocyanate Resin market?
5. Who are the Major Players in the global 2K Non-Isocyanate Resin market?
6. What are the growth factors driving the market demand?

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