

Global Blocked Isocyanate Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Blocked Isocyanate market size was valued at US\$ 354 million in 2025 and is forecast to a readjusted size of US\$ 514 million by 2032 with a CAGR of 5.5% during review period.

In 2024, global blocked isocyanate production reached approximately 26,385 tons, with an average global market price of around US\$ 12,715 per ton. Blocked isocyanate refers to a compound prepared by blocking a blocked group of isocyanate groups (-NCO) by a deblocking reaction that cannot be carried out at a lower temperature. This compound does not undergo polymerization at room temperature, but at a certain temperature and other conditions, the isocyanate groups in the blocked polyurethane can be regenerated, and a crosslinking reaction occurs to form a thermosetting polyurethane. The isocyanate group is blocked by reacting an isocyanate or a prepolymer containing a free isocyanate group with some active hydrogen-containing substance or a substance capable of reacting with an isocyanate group, so that the free isocyanate group is not reactive at normal temperature, that is, isocyanate is achieved. The base is closed. This blocking reaction is a reversible reaction under certain conditions, so that the blocked isocyanate group can function again.

Overall, the global blocked isocyanate market is expected to maintain steady growth, with high concentration in the international market. Domestic enterprises are gradually enhancing their competitiveness through technological innovation, product diversification, and expansion into downstream applications. Looking ahead, environmental regulations, increasing demand for high-performance downstream applications, and strong R&D capabilities will remain the key drivers of market expansion. In the global competitive landscape, companies that can balance product

performance, environmental compliance, and cost efficiency will hold a clear advantage.

By product type, solvent-based blocked isocyanates remain dominant, with their market share projected to reach 56% by 2031. This dominance is largely due to their ease of application, formulation flexibility, and widespread use in industrial coatings, wood coatings, and automotive finishing. Waterborne blocked isocyanates are experiencing rapid growth, driven by stricter environmental regulations and increasing demand for low-VOC solutions. Their advantages of low emissions and eco-friendliness are making them the preferred choice for high-end automotive coatings and architectural coatings. Powder-based blocked isocyanates perform exceptionally well in powder coatings, offering high solid content, excellent chemical resistance, and uniform film thickness, making them particularly suitable for durable finishes in automotive chassis, home appliance exteriors, and electronic housings. Overall, the penetration of powder and waterborne systems is rising quickly and will become the main growth drivers over the next five years.

In terms of applications, coatings remain the largest downstream market for blocked isocyanates, accounting for around 74% of the market in 2024, indicating continued strong demand from the coatings sector. Adhesives and composites are also seeing rapid growth, particularly in automotive structural adhesives, electronic encapsulation, and high-performance composite materials, where the superior properties of blocked isocyanates are increasingly recognized. Meanwhile, the development of low-free isocyanate technology and fast-curing systems has supported the adoption of high-performance waterborne and powder coatings, as well as high-end industrial adhesives. On the production side, companies are optimizing their global manufacturing networks to balance cost efficiency with responsiveness, with the fast-growing Chinese market attracting more international investment and partnerships.

From an industry environment perspective, the growth of blocked isocyanates is driven by both favorable factors and challenges. On one hand, increasingly stringent environmental regulations, VOC emission controls, low-toxicity requirements, and construction safety standards encourage downstream companies to prefer safe, environmentally friendly, and low-VOC blocked isocyanate products, which provides sustained momentum for technological upgrades and product innovation. On the other hand, the performance demands of downstream applications such as coatings, adhesives, and industrial uses in automotive and wood sectors—including weather resistance, adhesion, chemical resistance, and ease of application—drive continuous investment in R&D, formulation optimization, and process improvement. However, raw

material price fluctuations, rising production costs, and intensified competition may pressure profitability, especially for small and medium-sized domestic companies facing challenges in R&D investment and capacity expansion.

In terms of future trends, the industry will feature accelerated adoption of low-VOC and eco-friendly products, parallel growth of solvent-based and waterborne products, increasing demand from coatings and high-performance industrial applications, and production strategies focusing on cost optimization and localized manufacturing.

This report is a detailed and comprehensive analysis for global Blocked Isocyanate market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Blocked Isocyanate market size and forecasts, in consumption value (\$ Million), sales quantity (MT), and average selling prices (USD/MT), 2021-2032

Global Blocked Isocyanate market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (MT), and average selling prices (USD/MT), 2021-2032

Global Blocked Isocyanate market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (MT), and average selling prices (USD/MT), 2021-2032

Global Blocked Isocyanate market shares of main players, shipments in revenue (\$ Million), sales quantity (MT), and ASP (USD/MT), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Blocked Isocyanate

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Blocked Isocyanate market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Covestro, Vencorex, UBE, Asahi Kasei, Evonik, Wanhua Chemical Group, Mitsui Chemicals, Tosoh, Meisei Chem, Leeson Polyurethanes, etc.

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

Market Segmentation

Blocked Isocyanate market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Solvent-based

Water-based

Powder

Market segment by Application

Coatings

Adhesives

Other

Major players covered

Covestro

Vencorex

UBE

Asahi Kasei

Evonik

Wanhua Chemical Group

Mitsui Chemicals

Tosoh

Meisei Chem

Leeson Polyurethanes

Shiquanxing New Material Technology

Rudolf

Chimica Lombarda

Yele New Material Technology

Guanzhi New Material Technology

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Blocked Isocyanate product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Blocked Isocyanate, with price, sales quantity, revenue, and global market share of Blocked Isocyanate from 2021 to 2026.

Chapter 3, the Blocked Isocyanate competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Blocked Isocyanate breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Blocked Isocyanate market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Blocked Isocyanate.

Chapter 14 and 15, to describe Blocked Isocyanate sales channel, distributors, customers, research findings and conclusion.

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