

Global Blocked Polyurethane Curing Agent 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 Polyurethane Curing Agent 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 polyurethane curing agent production reached approximately 26,385 tons, with an average global market price of around US\$ 12,715 per ton. Blocked polyurethane curing agent is a cross-linking agent that temporarily inactivates the isocyanate functional group by using a blocking agent (such as ketoxime, alcohols, amines, esters, etc.). It can avoid side reactions between NCO and water, alcohol, etc. during storage and transportation, and has excellent storage stability and environmental compatibility. Under curing conditions (usually heated to 100-180°C), the blocking agent dissociates, releases active NCO, and cross-links with the hydroxyl group in the resin to form a high-performance polyurethane network structure. The cured coating has excellent water resistance, chemical resistance, adhesion and mechanical strength, and is widely used in high-performance coating fields such as automotive coating, metal anti-corrosion, wood coating, electronic packaging, and fabric finishing. As a key additive for low-VOC and environmentally friendly formulations, blocked polyurethane curing agents are continuing to develop in the direction of low-temperature unblocking, rapid reaction, and high cross-linking efficiency.

Overall, the global blocked polyurethane crosslinker market is expected to maintain steady growth. The international market is highly concentrated, while domestic companies are gradually enhancing their global competitiveness through technological innovation, product diversification, and expansion into downstream applications. Looking ahead, environmental regulations, increasing demand for high-performance

downstream applications, and companies' R&D capabilities will serve as the primary drivers for continued market expansion. In the global competitive landscape, companies that can balance product performance, environmental compliance, and cost control will hold a clear advantage.

In terms of product types, solvent-based blocked polyurethane crosslinkers remain dominant, with an expected market share of 56% by 2031. This is largely due to their ease of application, formulation adaptability, and broad use in industrial coatings, wood coatings, and automotive finishes. Waterborne blocked crosslinkers are rapidly growing as environmental regulations tighten and low-VOC requirements increase. Their low emissions and eco-friendliness are gradually making them the preferred choice for high-end automotive coatings and architectural coatings. Powder-based crosslinkers stand out in the powder coating segment, offering high solid content, excellent chemical resistance, and uniform coating thickness, making them particularly suitable for automotive chassis, home appliance exteriors, and electronic housings requiring high-durability finishes. Overall, the penetration of powder and waterborne crosslinkers is increasing rapidly, positioning them as the main growth drivers in the next five years.

Regarding application areas, coatings remain the primary downstream market for blocked polyurethane crosslinkers, accounting for approximately 74% of the market in 2024, indicating sustained demand for high-performance crosslinkers in the coating industry. Adhesives and composite applications are also seeing significant growth, particularly in automotive structural adhesives, electronic encapsulation, and high-performance composites, where the superior properties of blocked crosslinkers are increasingly recognized. Advances in low-free isocyanate technology and fast-curing systems have further facilitated the adoption of high-performance waterborne, powder coatings, and high-end industrial adhesives. On the production side, companies are gradually optimizing their global manufacturing networks to balance cost control with market responsiveness, with the rapidly growing Chinese market attracting more international investment and partnerships.

From a global market perspective, leading players such as Covestro, Vencorex, UBE, Asahi Kasei, and Evonik dominate the industry, with the top five companies accounting for approximately 62% of the international market in 2024, highlighting the high concentration and technological barriers. Overall, both global and domestic markets exhibit high concentration and high technological thresholds, requiring companies to enhance core competitiveness through innovation, process optimization, and downstream expansion, while also providing opportunities for newcomers to enter the market through differentiated products and technological breakthroughs.

Regarding the industry environment, growth in blocked polyurethane crosslinkers is driven by both favorable and challenging factors. On one hand, increasingly strict environmental regulations, VOC emission control, low-toxicity requirements, and construction safety standards drive downstream enterprises to choose safe, environmentally friendly, low-VOC blocked crosslinkers, providing ongoing impetus for technological upgrades and product innovation. The performance demands of downstream coatings, adhesives, and high-performance industrial applications in automotive, wood, and other sectors?such as weather resistance, adhesion, chemical resistance, and application convenience?further encourage continuous investment in R&D, formulation optimization, and process improvement. On the other hand, raw material price fluctuations, rising production costs, and intensified market competition may pressure profitability, especially for small- and medium-sized domestic companies facing challenges in R&D investment and capacity expansion.

In terms of development trends, the industry is characterized by accelerated adoption of low-VOC and environmentally friendly products, parallel growth of solvent-based and waterborne crosslinkers, rising demand from coatings and high-performance industrial applications, and production strategies that balance cost optimization with localized manufacturing.

This report is a detailed and comprehensive analysis for global Blocked Polyurethane Curing Agent 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 Polyurethane Curing Agent market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Blocked Polyurethane Curing Agent market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Blocked Polyurethane Curing Agent market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Blocked Polyurethane Curing Agent market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 Polyurethane Curing Agent

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 Polyurethane Curing Agent 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 Polyurethane Curing Agent 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 Polyurethane Curing Agent product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Blocked Polyurethane Curing Agent 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 Polyurethane Curing Agent 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 Polyurethane Curing Agent.

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

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Blocked Polyurethane Curing Agent Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Solvent-based

1.3.3 Water-based

1.3.4 Powder

1.4 Market Analysis by Application

1.4.1 Overview: Global Blocked Polyurethane Curing Agent Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.4.2 Coatings

1.4.3 Adhesives

1.4.4 Other

1.5 Global Blocked Polyurethane Curing Agent Market Size & Forecast

1.5.1 Global Blocked Polyurethane Curing Agent Consumption Value (2021 & 2025 & 2032)

1.5.2 Global Blocked Polyurethane Curing Agent Sales Quantity (2021-2032)

1.5.3 Global Blocked Polyurethane Curing Agent Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Covestro

2.1.1 Covestro Details

2.1.2 Covestro Major Business

2.1.3 Covestro Blocked Polyurethane Curing Agent Product and Services

2.1.4 Covestro Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Covestro Recent Developments/Updates

2.2 Vencorex

2.2.1 Vencorex Details

2.2.2 Vencorex Major Business

2.2.3 Vencorex Blocked Polyurethane Curing Agent Product and Services

2.2.4 Vencorex Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Vencorex Recent Developments/Updates

2.3 UBE

2.3.1 UBE Details

2.3.2 UBE Major Business

2.3.3 UBE Blocked Polyurethane Curing Agent Product and Services

2.3.4 UBE Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 UBE Recent Developments/Updates

2.4 Asahi Kasei

2.4.1 Asahi Kasei Details

2.4.2 Asahi Kasei Major Business

2.4.3 Asahi Kasei Blocked Polyurethane Curing Agent Product and Services

2.4.4 Asahi Kasei Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Asahi Kasei Recent Developments/Updates

2.5 Evonik

2.5.1 Evonik Details

2.5.2 Evonik Major Business

2.5.3 Evonik Blocked Polyurethane Curing Agent Product and Services

2.5.4 Evonik Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Evonik Recent Developments/Updates

2.6 Wanhua Chemical Group

2.6.1 Wanhua Chemical Group Details

2.6.2 Wanhua Chemical Group Major Business

2.6.3 Wanhua Chemical Group Blocked Polyurethane Curing Agent Product and Services

2.6.4 Wanhua Chemical Group Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 Wanhua Chemical Group Recent Developments/Updates

2.7 Mitsui Chemicals

2.7.1 Mitsui Chemicals Details

2.7.2 Mitsui Chemicals Major Business

2.7.3 Mitsui Chemicals Blocked Polyurethane Curing Agent Product and Services

2.7.4 Mitsui Chemicals Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Mitsui Chemicals Recent Developments/Updates

2.8 Tosoh

2.8.1 Tosoh Details

- 2.8.2 Tosoh Major Business
- 2.8.3 Tosoh Blocked Polyurethane Curing Agent Product and Services
- 2.8.4 Tosoh Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.8.5 Tosoh Recent Developments/Updates
- 2.9 Meisei Chem
 - 2.9.1 Meisei Chem Details
 - 2.9.2 Meisei Chem Major Business
 - 2.9.3 Meisei Chem Blocked Polyurethane Curing Agent Product and Services
 - 2.9.4 Meisei Chem Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Meisei Chem Recent Developments/Updates
- 2.10 Leeson Polyurethanes
 - 2.10.1 Leeson Polyurethanes Details
 - 2.10.2 Leeson Polyurethanes Major Business
 - 2.10.3 Leeson Polyurethanes Blocked Polyurethane Curing Agent Product and Services
 - 2.10.4 Leeson Polyurethanes Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Leeson Polyurethanes Recent Developments/Updates
- 2.11 Shiquanxing New Material Technology
 - 2.11.1 Shiquanxing New Material Technology Details
 - 2.11.2 Shiquanxing New Material Technology Major Business
 - 2.11.3 Shiquanxing New Material Technology Blocked Polyurethane Curing Agent Product and Services
 - 2.11.4 Shiquanxing New Material Technology Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.11.5 Shiquanxing New Material Technology Recent Developments/Updates
- 2.12 Rudolf
 - 2.12.1 Rudolf Details
 - 2.12.2 Rudolf Major Business
 - 2.12.3 Rudolf Blocked Polyurethane Curing Agent Product and Services
 - 2.12.4 Rudolf Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 Rudolf Recent Developments/Updates
- 2.13 Chimica Lombarda
 - 2.13.1 Chimica Lombarda Details
 - 2.13.2 Chimica Lombarda Major Business
 - 2.13.3 Chimica Lombarda Blocked Polyurethane Curing Agent Product and Services

2.13.4 Chimica Lombarda Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Chimica Lombarda Recent Developments/Updates

2.14 Yele New Material Technology

2.14.1 Yele New Material Technology Details

2.14.2 Yele New Material Technology Major Business

2.14.3 Yele New Material Technology Blocked Polyurethane Curing Agent Product and Services

2.14.4 Yele New Material Technology Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Yele New Material Technology Recent Developments/Updates

2.15 Guanzhi New Material Technology

2.15.1 Guanzhi New Material Technology Details

2.15.2 Guanzhi New Material Technology Major Business

2.15.3 Guanzhi New Material Technology Blocked Polyurethane Curing Agent Product and Services

2.15.4 Guanzhi New Material Technology Blocked Polyurethane Curing Agent Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 Guanzhi New Material Technology Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: BLOCKED POLYURETHANE CURING AGENT BY MANUFACTURER

3.1 Global Blocked Polyurethane Curing Agent Sales Quantity by Manufacturer (2021-2026)

3.2 Global Blocked Polyurethane Curing Agent Revenue by Manufacturer (2021-2026)

3.3 Global Blocked Polyurethane Curing Agent Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Blocked Polyurethane Curing Agent by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Blocked Polyurethane Curing Agent Manufacturer Market Share in 2025

3.4.3 Top 6 Blocked Polyurethane Curing Agent Manufacturer Market Share in 2025

3.5 Blocked Polyurethane Curing Agent Market: Overall Company Footprint Analysis

3.5.1 Blocked Polyurethane Curing Agent Market: Region Footprint

3.5.2 Blocked Polyurethane Curing Agent Market: Company Product Type Footprint

3.5.3 Blocked Polyurethane Curing Agent Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Blocked Polyurethane Curing Agent Market Size by Region

4.1.1 Global Blocked Polyurethane Curing Agent Sales Quantity by Region (2021-2032)

4.1.2 Global Blocked Polyurethane Curing Agent Consumption Value by Region (2021-2032)

4.1.3 Global Blocked Polyurethane Curing Agent Average Price by Region (2021-2032)

4.2 North America Blocked Polyurethane Curing Agent Consumption Value (2021-2032)

4.3 Europe Blocked Polyurethane Curing Agent Consumption Value (2021-2032)

4.4 Asia-Pacific Blocked Polyurethane Curing Agent Consumption Value (2021-2032)

4.5 South America Blocked Polyurethane Curing Agent Consumption Value (2021-2032)

4.6 Middle East & Africa Blocked Polyurethane Curing Agent Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Blocked Polyurethane Curing Agent Sales Quantity by Type (2021-2032)

5.2 Global Blocked Polyurethane Curing Agent Consumption Value by Type (2021-2032)

5.3 Global Blocked Polyurethane Curing Agent Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Blocked Polyurethane Curing Agent Sales Quantity by Application (2021-2032)

6.2 Global Blocked Polyurethane Curing Agent Consumption Value by Application (2021-2032)

6.3 Global Blocked Polyurethane Curing Agent Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Blocked Polyurethane Curing Agent Sales Quantity by Type (2021-2032)

7.2 North America Blocked Polyurethane Curing Agent Sales Quantity by Application (2021-2032)

7.3 North America Blocked Polyurethane Curing Agent Market Size by Country

7.3.1 North America Blocked Polyurethane Curing Agent Sales Quantity by Country (2021-2032)

7.3.2 North America Blocked Polyurethane Curing Agent Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Blocked Polyurethane Curing Agent Sales Quantity by Type (2021-2032)

8.2 Europe Blocked Polyurethane Curing Agent Sales Quantity by Application (2021-2032)

8.3 Europe Blocked Polyurethane Curing Agent Market Size by Country

8.3.1 Europe Blocked Polyurethane Curing Agent Sales Quantity by Country (2021-2032)

8.3.2 Europe Blocked Polyurethane Curing Agent Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Blocked Polyurethane Curing Agent Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Blocked Polyurethane Curing Agent Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Blocked Polyurethane Curing Agent Market Size by Region

9.3.1 Asia-Pacific Blocked Polyurethane Curing Agent Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Blocked Polyurethane Curing Agent Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

- 9.3.4 Japan Market Size and Forecast (2021-2032)
- 9.3.5 South Korea Market Size and Forecast (2021-2032)
- 9.3.6 India Market Size and Forecast (2021-2032)
- 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
- 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Blocked Polyurethane Curing Agent Sales Quantity by Type (2021-2032)
- 10.2 South America Blocked Polyurethane Curing Agent Sales Quantity by Application (2021-2032)
- 10.3 South America Blocked Polyurethane Curing Agent Market Size by Country
 - 10.3.1 South America Blocked Polyurethane Curing Agent Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Blocked Polyurethane Curing Agent Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Blocked Polyurethane Curing Agent Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Blocked Polyurethane Curing Agent Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Blocked Polyurethane Curing Agent Market Size by Country
 - 11.3.1 Middle East & Africa Blocked Polyurethane Curing Agent Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Blocked Polyurethane Curing Agent Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Blocked Polyurethane Curing Agent Market Drivers

12.2 Blocked Polyurethane Curing Agent Market Restraints

12.3 Blocked Polyurethane Curing Agent Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Blocked Polyurethane Curing Agent and Key Manufacturers

13.2 Manufacturing Costs Percentage of Blocked Polyurethane Curing Agent

13.3 Blocked Polyurethane Curing Agent Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Blocked Polyurethane Curing Agent Typical Distributors

14.3 Blocked Polyurethane Curing Agent Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Zinc Alkyls Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Zinc Alkyls Consumption Value by Purity, (USD Million), 2021 & 2025 & 2032

Table 3. Global Zinc Alkyls Consumption Value by Sales Channel, (USD Million), 2021 & 2025 & 2032

Table 4. Global Zinc Alkyls Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Nouryon Basic Information, Manufacturing Base and Competitors

Table 6. Nouryon Major Business

Table 7. Nouryon Zinc Alkyls Product and Services

Table 8. Nouryon Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Nouryon Recent Developments/Updates

Table 10. Albemarle Basic Information, Manufacturing Base and Competitors

Table 11. Albemarle Major Business

Table 12. Albemarle Zinc Alkyls Product and Services

Table 13. Albemarle Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Albemarle Recent Developments/Updates

Table 15. Linde Basic Information, Manufacturing Base and Competitors

Table 16. Linde Major Business

Table 17. Linde Zinc Alkyls Product and Services

Table 18. Linde Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. Linde Recent Developments/Updates

Table 20. Air Liquide Basic Information, Manufacturing Base and Competitors

Table 21. Air Liquide Major Business

Table 22. Air Liquide Zinc Alkyls Product and Services

Table 23. Air Liquide Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Air Liquide Recent Developments/Updates

Table 25. Lanxess Basic Information, Manufacturing Base and Competitors

Table 26. Lanxess Major Business

Table 27. Lanxess Zinc Alkyls Product and Services

Table 28. Lanxess Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Lanxess Recent Developments/Updates

Table 30. Ereztech Basic Information, Manufacturing Base and Competitors

Table 31. Ereztech Major Business

Table 32. Ereztech Zinc Alkyls Product and Services

Table 33. Ereztech Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Ereztech Recent Developments/Updates

Table 35. Dockweiler Chemicals GmbH Basic Information, Manufacturing Base and Competitors

Table 36. Dockweiler Chemicals GmbH Major Business

Table 37. Dockweiler Chemicals GmbH Zinc Alkyls Product and Services

Table 38. Dockweiler Chemicals GmbH Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Dockweiler Chemicals GmbH Recent Developments/Updates

Table 40. Shaoxing Shangyu Hualun Chemical Basic Information, Manufacturing Base and Competitors

Table 41. Shaoxing Shangyu Hualun Chemical Major Business

Table 42. Shaoxing Shangyu Hualun Chemical Zinc Alkyls Product and Services

Table 43. Shaoxing Shangyu Hualun Chemical Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Shaoxing Shangyu Hualun Chemical Recent Developments/Updates

Table 45. Dalian Creditchem Basic Information, Manufacturing Base and Competitors

Table 46. Dalian Creditchem Major Business

Table 47. Dalian Creditchem Zinc Alkyls Product and Services

Table 48. Dalian Creditchem Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Dalian Creditchem Recent Developments/Updates

Table 50. Jiangsu MO Opto-Electronic Material Basic Information, Manufacturing Base and Competitors

Table 51. Jiangsu MO Opto-Electronic Material Major Business

Table 52. Jiangsu MO Opto-Electronic Material Zinc Alkyls Product and Services

Table 53. Jiangsu MO Opto-Electronic Material Zinc Alkyls Sales Quantity (Tons), Average Price (US\$/Kg), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Jiangsu MO Opto-Electronic Material Recent Developments/Updates

Table 55. Global Zinc Alkyls Sales Quantity by Manufacturer (2021-2026) & (Tons)

Table 56. Global Zinc Alkyls Revenue by Manufacturer (2021-2026) & (USD Million)

Table 57. Global Zinc Alkyls Average Price by Manufacturer (2021-2026) & (US\$/Kg)

Table 58. Market Position of Manufacturers in Zinc Alkyls, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 59. Head Office and Zinc Alkyls Production Site of Key Manufacturer

Table 60. Zinc Alkyls Market: Company Product Type Footprint

Table 61. Zinc Alkyls Market: Company Product Application Footprint

Table 62. Zinc Alkyls New Market Entrants and Barriers to Market Entry

Table 63. Zinc Alkyls Mergers, Acquisition, Agreements, and Collaborations

Table 64. Global Zinc Alkyls Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 65. Global Zinc Alkyls Sales Quantity by Region (2021-2026) & (Tons)

Table 66. Global Zinc Alkyls Sales Quantity by Region (2027-2032) & (Tons)

Table 67. Global Zinc Alkyls Consumption Value by Region (2021-2026) & (USD Million)

Table 68. Global Zinc Alkyls Consumption Value by Region (2027-2032) & (USD Million)

Table 69. Global Zinc Alkyls Average Price by Region (2021-2026) & (US\$/Kg)

Table 70. Global Zinc Alkyls Average Price by Region (2027-2032) & (US\$/Kg)

Table 71. Global Zinc Alkyls Sales Quantity by Type (2021-2026) & (Tons)

Table 72. Global Zinc Alkyls Sales Quantity by Type (2027-2032) & (Tons)

Table 73. Global Zinc Alkyls Consumption Value by Type (2021-2026) & (USD Million)

Table 74. Global Zinc Alkyls Consumption Value by Type (2027-2032) & (USD Million)

Table 75. Global Zinc Alkyls Average Price by Type (2021-2026) & (US\$/Kg)

Table 76. Global Zinc Alkyls Average Price by Type (2027-2032) & (US\$/Kg)

Table 77. Global Zinc Alkyls Sales Quantity by Application (2021-2026) & (Tons)

Table 78. Global Zinc Alkyls Sales Quantity by Application (2027-2032) & (Tons)

Table 79. Global Zinc Alkyls Consumption Value by Application (2021-2026) & (USD Million)

Table 80. Global Zinc Alkyls Consumption Value by Application (2027-2032) & (USD Million)

Table 81. Global Zinc Alkyls Average Price by Application (2021-2026) & (US\$/Kg)

Table 82. Global Zinc Alkyls Average Price by Application (2027-2032) & (US\$/Kg)

Table 83. North America Zinc Alkyls Sales Quantity by Type (2021-2026) & (Tons)

Table 84. North America Zinc Alkyls Sales Quantity by Type (2027-2032) & (Tons)

Table 85. North America Zinc Alkyls Sales Quantity by Application (2021-2026) & (Tons)

Table 86. North America Zinc Alkyls Sales Quantity by Application (2027-2032) & (Tons)

Table 87. North America Zinc Alkyls Sales Quantity by Country (2021-2026) & (Tons)

Table 88. North America Zinc Alkyls Sales Quantity by Country (2027-2032) & (Tons)

Table 89. North America Zinc Alkyls Consumption Value by Country (2021-2026) & (USD Million)

Table 90. North America Zinc Alkyls Consumption Value by Country (2027-2032) & (USD Million)

Table 91. Europe Zinc Alkyls Sales Quantity by Type (2021-2026) & (Tons)

Table 92. Europe Zinc Alkyls Sales Quantity by Type (2027-2032) & (Tons)

Table 93. Europe Zinc Alkyls Sales Quantity by Application (2021-2026) & (Tons)

Table 94. Europe Zinc Alkyls Sales Quantity by Application (2027-2032) & (Tons)

Table 95. Europe Zinc Alkyls Sales Quantity by Country (2021-2026) & (Tons)

Table 96. Europe Zinc Alkyls Sales Quantity by Country (2027-2032) & (Tons)

Table 97. Europe Zinc Alkyls Consumption Value by Country (2021-2026) & (USD Million)

Table 98. Europe Zinc Alkyls Consumption Value by Country (2027-2032) & (USD Million)

Table 99. Asia-Pacific Zinc Alkyls Sales Quantity by Type (2021-2026) & (Tons)

Table 100. Asia-Pacific Zinc Alkyls Sales Quantity by Type (2027-2032) & (Tons)

Table 101. Asia-Pacific Zinc Alkyls Sales Quantity by Application (2021-2026) & (Tons)

Table 102. Asia-Pacific Zinc Alkyls Sales Quantity by Application (2027-2032) & (Tons)

Table 103. Asia-Pacific Zinc Alkyls Sales Quantity by Region (2021-2026) & (Tons)

Table 104. Asia-Pacific Zinc Alkyls Sales Quantity by Region (2027-2032) & (Tons)

Table 105. Asia-Pacific Zinc Alkyls Consumption Value by Region (2021-2026) & (USD Million)

Table 106. Asia-Pacific Zinc Alkyls Consumption Value by Region (2027-2032) & (USD Million)

Table 107. South America Zinc Alkyls Sales Quantity by Type (2021-2026) & (Tons)

Table 108. South America Zinc Alkyls Sales Quantity by Type (2027-2032) & (Tons)

Table 109. South America Zinc Alkyls Sales Quantity by Application (2021-2026) & (Tons)

Table 110. South America Zinc Alkyls Sales Quantity by Application (2027-2032) & (Tons)

Table 111. South America Zinc Alkyls Sales Quantity by Country (2021-2026) & (Tons)

Table 112. South America Zinc Alkyls Sales Quantity by Country (2027-2032) & (Tons)

Table 113. South America Zinc Alkyls Consumption Value by Country (2021-2026) & (USD Million)

Table 114. South America Zinc Alkyls Consumption Value by Country (2027-2032) & (USD Million)

Table 115. Middle East & Africa Zinc Alkyls Sales Quantity by Type (2021-2026) &

(Tons)

Table 116. Middle East & Africa Zinc Alkyls Sales Quantity by Type (2027-2032) &

(Tons)

Table 117. Middle East & Africa Zinc Alkyls Sales Quantity by Application (2021-2026)

& (Tons)

Table 118. Middle East & Africa Zinc Alkyls Sales Quantity by Application (2027-2032)

& (Tons)

Table 119. Middle East & Africa Zinc Alkyls Sales Quantity by Country (2021-2026) &

(Tons)

Table 120. Middle East & Africa Zinc Alkyls Sales Quantity by Country (2027-2032) &

(Tons)

Table 121. Middle East & Africa Zinc Alkyls Consumption Value by Country (2021-2026)

& (USD Million)

Table 122. Middle East & Africa Zinc Alkyls Consumption Value by Country (2027-2032)

& (USD Million)

Table 123. Zinc Alkyls Raw Material

Table 124. Key Manufacturers of Zinc Alkyls Raw Materials

Table 125. Zinc Alkyls Typical Distributors

Table 126. Zinc Alkyls Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Zinc Alkyls Picture
- Figure 2. Global Zinc Alkyls Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Zinc Alkyls Revenue Market Share by Type in 2025
- Figure 4. Dimethylzinc Examples
- Figure 5. Diethylzinc Examples
- Figure 6. Global Zinc Alkyls Revenue by Purity, (USD Million), 2021 & 2025 & 2032
- Figure 7. Global Zinc Alkyls Revenue Market Share by Purity in 2025
- Figure 8. Purity ≥99% Examples
- Figure 9. Purity ≥99.99% Examples
- Figure 10. Others Examples
- Figure 11. Global Zinc Alkyls Revenue by Sales Channel, (USD Million), 2021 & 2025 & 2032
- Figure 12. Global Zinc Alkyls Revenue Market Share by Sales Channel in 2025
- Figure 13. Direct Sales Examples
- Figure 14. Distribution Examples
- Figure 15. Global Zinc Alkyls Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 16. Global Zinc Alkyls Revenue Market Share by Application in 2025
- Figure 17. Pharmaceuticals Examples
- Figure 18. Photovoltaic Industry Examples
- Figure 19. Others Examples
- Figure 20. Global Zinc Alkyls Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 21. Global Zinc Alkyls Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 22. Global Zinc Alkyls Sales Quantity (2021-2032) & (Tons)
- Figure 23. Global Zinc Alkyls Price (2021-2032) & (US\$/Kg)
- Figure 24. Global Zinc Alkyls Sales Quantity Market Share by Manufacturer in 2025
- Figure 25. Global Zinc Alkyls Revenue Market Share by Manufacturer in 2025
- Figure 26. Producer Shipments of Zinc Alkyls by Manufacturer Sales (\$MM) and Market Share (%): 2025
- Figure 27. Top 3 Zinc Alkyls Manufacturer (Revenue) Market Share in 2025
- Figure 28. Top 6 Zinc Alkyls Manufacturer (Revenue) Market Share in 2025
- Figure 29. Global Zinc Alkyls Sales Quantity Market Share by Region (2021-2032)
- Figure 30. Global Zinc Alkyls Consumption Value Market Share by Region (2021-2032)
- Figure 31. North America Zinc Alkyls Consumption Value (2021-2032) & (USD Million)

- Figure 32. Europe Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 33. Asia-Pacific Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 34. South America Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 35. Middle East & Africa Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 36. Global Zinc Alkyls Sales Quantity Market Share by Type (2021-2032)
- Figure 37. Global Zinc Alkyls Consumption Value Market Share by Type (2021-2032)
- Figure 38. Global Zinc Alkyls Average Price by Type (2021-2032) & (US\$/Kg)
- Figure 39. Global Zinc Alkyls Sales Quantity Market Share by Application (2021-2032)
- Figure 40. Global Zinc Alkyls Revenue Market Share by Application (2021-2032)
- Figure 41. Global Zinc Alkyls Average Price by Application (2021-2032) & (US\$/Kg)
- Figure 42. North America Zinc Alkyls Sales Quantity Market Share by Type (2021-2032)
- Figure 43. North America Zinc Alkyls Sales Quantity Market Share by Application (2021-2032)
- Figure 44. North America Zinc Alkyls Sales Quantity Market Share by Country (2021-2032)
- Figure 45. North America Zinc Alkyls Consumption Value Market Share by Country (2021-2032)
- Figure 46. United States Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 47. Canada Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 48. Mexico Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 49. Europe Zinc Alkyls Sales Quantity Market Share by Type (2021-2032)
- Figure 50. Europe Zinc Alkyls Sales Quantity Market Share by Application (2021-2032)
- Figure 51. Europe Zinc Alkyls Sales Quantity Market Share by Country (2021-2032)
- Figure 52. Europe Zinc Alkyls Consumption Value Market Share by Country (2021-2032)
- Figure 53. Germany Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 54. France Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 55. United Kingdom Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 56. Russia Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 57. Italy Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 58. Asia-Pacific Zinc Alkyls Sales Quantity Market Share by Type (2021-2032)
- Figure 59. Asia-Pacific Zinc Alkyls Sales Quantity Market Share by Application (2021-2032)
- Figure 60. Asia-Pacific Zinc Alkyls Sales Quantity Market Share by Region (2021-2032)
- Figure 61. Asia-Pacific Zinc Alkyls Consumption Value Market Share by Region (2021-2032)
- Figure 62. China Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 63. Japan Zinc Alkyls Consumption Value (2021-2032) & (USD Million)

- Figure 64. South Korea Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 65. India Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 66. Southeast Asia Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 67. Australia Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 68. South America Zinc Alkyls Sales Quantity Market Share by Type (2021-2032)
- Figure 69. South America Zinc Alkyls Sales Quantity Market Share by Application (2021-2032)
- Figure 70. South America Zinc Alkyls Sales Quantity Market Share by Country (2021-2032)
- Figure 71. South America Zinc Alkyls Consumption Value Market Share by Country (2021-2032)
- Figure 72. Brazil Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 73. Argentina Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 74. Middle East & Africa Zinc Alkyls Sales Quantity Market Share by Type (2021-2032)
- Figure 75. Middle East & Africa Zinc Alkyls Sales Quantity Market Share by Application (2021-2032)
- Figure 76. Middle East & Africa Zinc Alkyls Sales Quantity Market Share by Country (2021-2032)
- Figure 77. Middle East & Africa Zinc Alkyls Consumption Value Market Share by Country (2021-2032)
- Figure 78. Turkey Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 79. Egypt Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 80. Saudi Arabia Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 81. South Africa Zinc Alkyls Consumption Value (2021-2032) & (USD Million)
- Figure 82. Zinc Alkyls Market Drivers
- Figure 83. Zinc Alkyls Market Restraints
- Figure 84. Zinc Alkyls Market Trends
- Figure 85. Porters Five Forces Analysis
- Figure 86. Manufacturing Cost Structure Analysis of Zinc Alkyls in 2025
- Figure 87. Manufacturing Process Analysis of Zinc Alkyls
- Figure 88. Zinc Alkyls Industrial Chain
- Figure 89. Sales Channel: Direct to End-User vs Distributors
- Figure 90. Direct Channel Pros & Cons
- Figure 91. Indirect Channel Pros & Cons
- Figure 92. Methodology
- Figure 93. Research Process and Data Source

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