

Global Isocyanate Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Isocyanate market size is expected to reach \$ 67660 million by 2032, rising at a market growth of 8.2% CAGR during the forecast period (2026-2032).

Isocyanates can be classified into two subgroups: aromatic diisocyanates and aliphatic diisocyanates. The main aromatic ones are 4,4'-diphenylmethane diisocyanate (MDI) and toluene diisocyanate (TDI). Regarding the aliphatic hardeners, three main chemicals must be mentioned: 1,6-hexamethylene diisocyanate (HDI), isophorone diisocyanate (IPDI), and the hydrogenated MDI 4,4'-dicyclohexane diisocyanate (H12-MDI).

Isocyanates, particularly diisocyanates such as TDI (toluene diisocyanate) and MDI (methylene diphenyl diisocyanate), are key raw materials in the production of polyurethane foams, coatings, adhesives, and sealants. The automotive industry is one of the largest consumers of these products, using them in car interiors, seat cushions, insulation, and adhesives for various components. The expanding automotive sector, driven by increasing vehicle production and rising consumer demand for comfort and safety, is fueling the demand for isocyanates. Isocyanates are widely used in the construction industry for the production of rigid and flexible polyurethane foams, insulation materials, coatings, and adhesives. The construction sector's growth, led by urbanization, industrialization, and government investments in infrastructure development, generates a significant demand for isocyanates. These materials offer thermal insulation, adhesion, and moisture resistance properties, making them suitable for construction applications. Polyurethane foams, which require isocyanates as a component, play a crucial role in the furniture and bedding industry. Isocyanates are used in the production of comfortable and durable mattresses, cushions, sofas, and chairs. With the rising disposable income and changing lifestyles, the demand for

furniture and bedding products is increasing, driving the demand for isocyanates. Isocyanates are utilized in the production of insulating foams, coatings, and adhesives for appliances and electronic devices. These materials provide thermal insulation, electrical insulation, and protective coatings, ensuring the efficiency and reliability of appliances and electronic products. With the continuous advancements in technology and the increasing adoption of smart home appliances and electronics, the demand for isocyanates is expected to grow. Isocyanates are essential components in the formulation of high-performance coatings, providing durability, chemical resistance, and weatherability. They are particularly used in two-component polyurethane coatings, which find applications in automotive refinishing, industrial coatings, and architectural paints. As industries and consumers increasingly demand high-quality finishes and long-lasting coatings, the demand for isocyanates in the paints and coatings industry is rising. Ongoing research and development activities in the field of isocyanates focus on developing improved and sustainable alternatives with reduced health and environmental impacts. Innovations such as low-VOC (volatile organic compounds) coatings, water-based polyurethane systems, and bio-based isocyanates are gaining attention. These advancements drive market growth by meeting stringent regulations, addressing customer concerns, and providing eco-friendly solutions. The demand for isocyanates is increasing in emerging economies, such as China, India, and Southeast Asian countries, due to rapid industrialization, urbanization, and infrastructure development. These regions are witnessing significant growth in automotive production, construction activities, and the manufacturing sector, leading to higher demand for isocyanates. The isocyanate market is influenced by stringent regulations aimed at reducing harmful emissions and promoting environmental sustainability. Regulatory bodies impose restrictions on the use and emissions of certain isocyanate compounds, driving the industry to develop safer and more sustainable alternatives. Environmentally friendly isocyanate derivatives, such as waterborne polyurethane systems, are gaining popularity as they offer reduced emissions and improved safety profiles.

This report studies the global Isocyanate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Isocyanate 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 Isocyanate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Isocyanate total production and demand, 2021-2032, (Kilotons)

Global Isocyanate total production value, 2021-2032, (USD Million)

Global Isocyanate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Isocyanate consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Isocyanate domestic production, consumption, key domestic manufacturers and share

Global Isocyanate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Isocyanate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Isocyanate production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Isocyanate 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 Wanhua Chemical, BASF, Covestro, Dow, Huntsman, Mitsui Chemicals, Tosoh, Kumho Mitsui Chemicals, Hanwha, Evonik, 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 Isocyanate market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Isocyanate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Isocyanate Market, Segmentation by Type:

Methylene Diphenyl Diisocyanate (MDI)

Toluene Diisocyanate (TDI)

Aliphatic Isocyanate

Global Isocyanate Market, Segmentation by Application:

Rigid Foam

Flexible Foam

Paints and Coatings

Adhesives and Sealants

Elastomers

Others

Companies Profiled:

Wanhua Chemical

BASF

Covestro

Dow

Huntsman

Mitsui Chemicals

Tosoh

Kumho Mitsui Chemicals

Hanwha

Evonik

Asahi Kasei

SABIC

Gujarat Narmada Valley Fertilizers & Chemicals (GNFC)

DIC

Karoon Petrochemical Company (KRNPC)

OCI

Cangzhou Dahua Group

Gansu Yinguang Chemical (Norinco Group)

Key Questions Answered:

1. How big is the global Isocyanate market?
2. What is the demand of the global Isocyanate market?
3. What is the year over year growth of the global Isocyanate market?
4. What is the production and production value of the global Isocyanate market?
5. Who are the key producers in the global Isocyanate market?
6. What are the growth factors driving the market demand?

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