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Global Non-isocyanate 2K Resins Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-isocyanate 2K Resins 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 approximately 35,000 metric tons in 2025

The average selling price was approximately US$6,320 per metric ton in 2025

The market has established industrial-scale commercialization while remaining a specialized high-performance coating resin segment

Industrial and protective coatings are a key commercialization field, with architectural and OEM coatings providing additional demand

Multiple curing platforms including Michael Addition, polyester-epoxy and silane-based chemistry are developing in parallel

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Market Trends

Non-isocyanate 2K resin development is progressing from simple substitution for conventional isocyanate-cured coatings toward integrated performance platforms combining worker safety, coating productivity, lower emissions and long-term durability. High-solids solventborne technology remains important because it can reduce solvent content while retaining the application characteristics required in industrial coatings, but waterborne non-isocyanate 2K systems are becoming a major innovation direction as formulators seek simultaneous reductions in VOC emissions and reactive isocyanate handling. Allnex has developed ACURE around Real Michael Addition chemistry, including malonate-functional polyester donors and acrylate-functional acceptors, and has extended the platform into waterborne ACURE AQ systems. Arkema has developed standard-solids, high-solids and waterborne NISO solutions, demonstrating the broader movement toward multiple formulation formats rather than a single technology architecture. Product development is increasingly focused on balancing rapid cure with sufficient pot life, improving direct-to-metal and primer adhesion, reducing curing temperatures, increasing chemical and weather resistance and expanding compatibility across metal, concrete, wood and plastic substrates. Another important trend is diversification of chemistry: polyester-epoxy systems, acrylic-epoxy systems, Michael Addition and silane or epoxy-polysiloxane technologies are competing to reproduce key 2K polyurethane performance characteristics without conventional polyisocyanate hardeners.

Market Dynamics

Drivers

The principal structural driver is the combination of occupational safety requirements and the coatings industry's demand for lower-emission high-performance systems. Isocyanates can create respiratory sensitization and occupational asthma risks, particularly during professional spraying, mixing and application. Under EU REACH Annex XVII, industrial and professional users of diisocyanates at concentrations of 0.1% by weight or above have been required to complete appropriate safe-use training since August 24, 2023. This does not eliminate conventional polyurethane coatings, but it increases the compliance, training and handling burden associated with reactive isocyanates and strengthens the commercial case for technically viable alternatives. In parallel, industrial coating users increasingly require higher solids content, lower VOC emissions, shorter return-to-service times and reduced curing energy. Non-isocyanate

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2K systems that combine ambient or low-temperature cure with durable film properties can therefore address both regulatory and productivity requirements, supporting adoption in protective coatings, maintenance coatings and selected OEM applications.

Restraints

The main restraint is the maturity and broad acceptance of conventional 2K polyurethane technology. Polyurethane systems have extensive formulation databases, established raw-material supply chains, mature application practices and long-term field performance records across industrial, automotive, construction and protective coatings. Non-isocyanate systems must therefore achieve a comparable balance of cure speed, pot life, hardness, flexibility, appearance, chemical resistance, weatherability and substrate adhesion while remaining economically competitive. Different NISO chemistries also have different formulation sensitivities, which can require adjustment of reactive-equivalent ratios, catalysts, solvents, humidity control, film thickness and substrate preparation. With global production of approximately 35,000 metric tons in 2025, the market has already moved beyond laboratory or pilot-scale commercialization, but it remains considerably more specialized than mainstream industrial coating resin systems. The average selling price of approximately US$6,320 per metric ton indicates that product value remains closely linked to functional chemistry, formulation performance and technical service rather than commodity resin economics.

Opportunities

The strongest opportunities are concentrated in applications where avoiding conventional isocyanate hardeners produces measurable benefits in worker protection, coating productivity or regulatory management. Industrial maintenance and protective coatings can benefit from ambient curing, high solids, rapid hardness development and reduced handling requirements, while direct-to-metal coatings provide opportunities to combine simplified coating structures with corrosion protection. OEM coatings offer additional potential where lower-temperature curing can reduce energy consumption and where manufacturing sites increasingly evaluate hazardous-material exposure and emissions. Waterborne NISO technology creates a second growth dimension because it can address both VOC reduction and isocyanate elimination within one formulation platform. Allnex's ACURE technology has demonstrated non-isocyanate systems across metal, primer, concrete, wood and plastic substrates, while Arkema has expanded NISO development into waterborne formulations for industrial coatings.

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Wacker Chemie's epoxy-polysiloxane systems provide another opportunity in weather-resistant protective topcoats, where isocyanate-free ambient-temperature crosslinking can be combined with high solids and long-term exterior performance.

Challenges

The major technical challenge is simultaneously controlling storage stability, pot life and curing speed. A commercially successful 2K system must remain stable before component mixing, retain sufficient working time after mixing and then develop handling strength, hardness and chemical resistance rapidly after application. These requirements can conflict, particularly in highly reactive systems. Long-term weatherability, hydrolytic stability, adhesion to different primers and substrates, recoating compatibility and performance under varying temperature and humidity conditions must also be validated. OEM and heavy-duty protective applications impose particularly long qualification cycles because coating systems are closely integrated with substrate preparation, primer selection, application equipment and customer specifications. Another challenge is achieving competitive total formulation cost. The relevant comparison is not only resin price but also coating solids, film-build efficiency, number of coating layers, energy consumption, application productivity, worker-protection requirements and maintenance interval. Suppliers capable of demonstrating lifecycle benefits rather than relying solely on the absence of isocyanates are therefore better positioned to expand adoption.

Industry Chain Analysis

The upstream industry consists of functional acrylic intermediates, polyester intermediates, epoxy resins and functional epoxy components, acrylate-functional materials, malonate-functional raw materials, silanes, silicone intermediates, catalysts, solvents and raw materials for waterborne dispersions. Midstream manufacturers design reactive resin pairs, donor and acceptor systems, functional binders and crosslinkers, with molecular structure, functionality, equivalent weight, solids content, viscosity, catalyst response and curing kinetics determining final coating performance. Allnex's Michael Addition platform, Polynt's polyester-epoxy chemistry, Wacker Chemie's epoxy-polysiloxane technology and Evonik Industries' silane crosslinking platform illustrate the diversity of midstream reaction routes. Downstream customers are primarily coating manufacturers and formulators serving industrial protection, construction and OEM markets. These customers combine the resin system with

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pigments, fillers, solvents or water, rheology modifiers and other additives to produce application-specific coatings. Value creation is concentrated in functional polymer design, curing control, formulation compatibility and validated end-use performance, making application laboratories, technical support and customer qualification capabilities important components of competitive strength.

Segment Insights

Non-Isocyanate 2K Acrylic Resins use acrylic or acrylic-functional polymers as an important reactive component and are particularly relevant to coating systems requiring appearance, gloss retention, chemical resistance and exterior durability. The technology is not limited to one curing mechanism. Arkema's high-solids NISO system, for example, combines a multifunctional acrylic resin with an epoxy-acrylic copolymer curing component, demonstrating a two-component acrylic-based system in which complementary functional groups replace conventional acrylic polyol/polyisocyanate curing. Waterborne acrylic-based NISO formulations are also being developed, strengthening the segment's potential in industrial coatings where both lower VOC and isocyanate-free curing are required.

Non-Isocyanate 2K Polyester Resins primarily use functional polyester structures as a major part of the reactive binder system. Allnex ACURE uses malonate-functional polyester donors in Michael Addition chemistry, while Polynt identifies AROFLINT as a 2K-NISO resin platform based on polyester-epoxy crosslinking chemistry. These technologies provide alternative approaches to rapid curing, hardness development, chemical resistance and protective coating performance without conventional isocyanate curing agents. The Others category covers additional non-isocyanate reactive architectures, particularly silane-crosslinked and epoxy-polysiloxane systems. Wacker Chemie's SILRES HP series is used as an aminofunctional silicone resin curing system for cycloaliphatic epoxy resins in two-component high-solids coatings, while Evonik Industries has developed silane crosslinker technology that can be combined with compatible polyols in 2K NISO formulations. Consequently, the three product categories represent different dominant resin architectures rather than three uniform curing mechanisms.

Downstream Market Opportunities

Industrial and protective coatings provide a major commercialization opportunity because customers in these applications place significant value on corrosion protection, chemical resistance, rapid return to service, high film build and manageable field

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application conditions. The technology is particularly relevant to machinery, industrial structures, infrastructure, maintenance and protective topcoats where conventional 2K polyurethane coatings are widely used. Architectural coatings opportunities are more concentrated in professional and high-performance applications such as metal structures, flooring, concrete protection and specialty construction coatings rather than mass-market decorative wall paints. OEM coatings represent an important medium- to long-term opportunity as manufacturers seek lower curing temperatures, improved production efficiency and reduced handling of reactive substances, although customer qualification cycles are generally longer. Continued development of waterborne systems, direct-to-metal formulations and coatings compatible with multiple substrates should expand the addressable market beyond the initial high-performance protective coating base.

Regional Insights

Europe has a particularly strong regulatory and occupational-safety impetus for adoption because REACH requirements governing professional and industrial use of diisocyanates have increased training and safe-handling obligations since August 2023. This creates favorable conditions for evaluation of non-isocyanate alternatives in protective, industrial and professional coating applications, especially when the replacement system also reduces VOC emissions or curing energy. North America is an important market for industrial maintenance, protective and OEM coating technologies, with occupational exposure management and coating productivity supporting interest in non-isocyanate approaches. Asia-Pacific offers substantial development potential because of its large industrial coatings, construction, transportation equipment and manufacturing base. Regional adoption is likely to depend heavily on local formulation support, pricing, raw-material availability and customer qualification, while suppliers capable of providing global technical platforms together with localized application development are positioned to benefit from wider adoption.

Competitive Landscape Analysis

The competitive landscape is characterized by differentiated curing technologies and formulation platforms rather than a single standardized NISO chemistry. Allnex has established a broad technology position through ACURE, which uses Real Michael Addition chemistry and includes malonate-functional polyester donor resins, acrylate-functional acceptors, high-solids systems and waterborne ACURE AQ development.

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Arkema has developed a dedicated NISO portfolio covering standard-solids, high-solids and waterborne systems, with acrylic and epoxy-acrylic reactive combinations targeting industrial and protective coatings. Polynt participates through AROFLINT, positioned specifically for high-performance 2K non-isocyanate coatings using polyester-epoxy crosslinking chemistry. Wacker Chemie differentiates through SILRES epoxy-polysiloxane curing technology for isocyanate-free, high-solids and weather-resistant topcoats, including applications in ships, bridges and industrial facilities. Evonik Industries provides silane-based NISO crosslinking technology capable of producing 2K systems with compatible resin components, emphasizing scratch resistance, chemical resistance and ambient-temperature curing. Helios Resins participates from its broader acrylic and polyester coating-resin platform and formulation capabilities. Across the competitive set, differentiation increasingly centers on polyurethane-equivalent performance, cure speed versus pot-life balance, waterborne capability, substrate adhesion, high-solids formulation, VOC reduction, application support and total coating-system economics.

Report Scope

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

This report is a detailed and comprehensive analysis of the world market for Non-isocyanate 2K Resins 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 Non-isocyanate 2K Resins that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-isocyanate 2K Resins total production and demand, 2021-2032, (Kiloton)

Global Non-isocyanate 2K Resins total production value, 2021-2032, (USD Million)

Global Non-isocyanate 2K Resins production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton), (based on production site)

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Global Non-isocyanate 2K Resins consumption by region & country, CAGR, 2021-2032 & (Kiloton)

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

Global Non-isocyanate 2K Resins production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kiloton)

Global Non-isocyanate 2K Resins production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton)

Global Non-isocyanate 2K Resins production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton)

This report profiles key players in the global Non-isocyanate 2K Resins 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 Non-isocyanate 2K Resins market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kiloton) 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.

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Global Non-isocyanate 2K Resins Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Non-isocyanate 2K Resins Market, Segmentation by Type:

Non-Isocyanate 2K Acrylic Resins

Non-Isocyanate 2K Polyester Resins

Others

Global Non-isocyanate 2K Resins Market, Segmentation by Dispersant:

Solvent-based

Water-based

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Global Non-isocyanate 2K Resins Market, Segmentation by Solid Content:

Solid Content <60%

Solid Content 60%–80%

Solid Content 80%–99%

Solid Content >99%

Global Non-isocyanate 2K Resins Market, Segmentation by Application:

Industrial and Protective Coatings

Architectural Coatings

OEM Coatings

Companies Profiled:

Allnex

Arkema

Polynt

Wacker Chemie

Evonik Industries

Helios Resins

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Key Questions Answered

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

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