

# Global Polymethylene Polyphenyl Polyisocyanate Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G75FCEE8CA36EN.html>

Date: June 2026

Pages: 90

Price: US\$ 3,480.00 (Single User License)

ID: G75FCEE8CA36EN

## Abstracts

According to our (Global Info Research) latest study, the global Polymethylene Polyphenyl Polyisocyanate market size was valued at US\$ 14027 million in 2025 and is forecast to a readjusted size of US\$ 18150 million by 2032 with a CAGR of 3.8% during review period.

Polymethylene Polyphenyl Polyisocyanate (PAPI or polymeric MDI) is a viscous liquid ranging in color from pale yellow to brown. Classified as an aromatic polyisocyanate, it is characterized primarily by its high NCO content, strong reactivity, and a functionality level higher than that of monomeric MDI; it reacts with polyether polyols, polyester polyols, and similar compounds to produce polyurethane materials.

The industry chain for polymethylene polyphenyl polyisocyanate is characterized by extremely high technological barriers and a high degree of resource concentration. The upstream segment relies primarily on the petrochemical infrastructure, with key raw materials including aniline, formaldehyde, liquid chlorine, and carbon monoxide. Among these, the stability of the aniline supply and fluctuations in crude oil prices are the critical factors influencing MDI production costs. Given that the manufacturing process involves highly toxic phosgenation reactions, the industry imposes exceptionally stringent requirements regarding safety, environmental protection, and process integration; consequently, global production capacity has long remained concentrated in the hands of a select few multinational giants.

In 2025, global sales volume for polymethylene polyphenyl polyisocyanate is projected to reach approximately 6.4 million tons, with a prevailing global average price ranging from \$2,000 to \$2,400 per ton and a comprehensive industry gross margin of

approximately 18% to 28%.

Polymethylene polyphenyl polyisocyanate—essentially polymeric MDI (PMDI)—is a quintessential bulk functional isocyanate raw material within the polyurethane industry chain. Its core advantages lie in its high functionality, strong reactivity, and facility in forming cross-linked structures, making it ideally suited for the production of rigid polyurethane foams, PIR insulation materials, structural foams, adhesives, sealants, and elastomers. However, this product also exhibits distinct cyclical characteristics; its pricing and gross margins are highly susceptible to fluctuations in upstream raw materials—such as aniline, formaldehyde, and chlorine—as well as the operating rates of MDI production facilities. Overall, polymethylenepolyphenyl polyisocyanate serves as a fundamental core raw material within polyurethane systems; going forward, the primary focal points of competition will continue to center on integrated cost efficiency, supply stability, the development of low-viscosity/high-functionality products, customer formulation support services, and increasing the market penetration of downstream energy-saving materials.

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

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

Global Polymethylene Polyphenyl Polyisocyanate 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 Polymethylene Polyphenyl Polyisocyanate 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 Polymethylene Polyphenyl Polyisocyanate

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 Polymethylene Polyphenyl Polyisocyanate 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, BASF, Dow, Huntsman, Wanhua Chemical, Tosoh, Kumho Mitsui Chemicals, Karun Petrochemical, etc.

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

## Market Segmentation

Polymethylene Polyphenyl Polyisocyanate 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

NCO Content  
NCO Content? 30%

### Market segment by Functionality

2.6–2.7

2.8–3.0

Other

#### Market segment by Viscosity

Low Viscosity

Medium Viscosity

High Viscosity

#### Market segment by Application

Polyurethane Foam

Coatings

Adhesives and Sealants

Elastomers

Others

#### Major players covered

Covestro

BASF

Dow

Huntsman

Wanhua Chemical

Tosoh

Kumho Mitsui Chemicals

Karun Petrochemical

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 Polymethylene Polyphenyl Polyisocyanate product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Polymethylene Polyphenyl Polyisocyanate 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 Polymethylene Polyphenyl Polyisocyanate 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 Polymethylene Polyphenyl Polyisocyanate.

Chapter 14 and 15, to describe Polymethylene Polyphenyl Polyisocyanate sales channel, distributors, customers, research findings and conclusion.

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