

Global Specialty Isocyanates Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G56F92EEE105EN.html>

Date: June 2026

Pages: 103

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

ID: G56F92EEE105EN

Abstracts

According to our (Global Info Research) latest study, the global Specialty Isocyanates market size was valued at US\$ 4424 million in 2025 and is forecast to a readjusted size of US\$ 6044 million by 2032 with a CAGR of 4.5% during review period.

Specialty isocyanates are a category of high-end chemical raw materials with special properties, unique structures and higher added value among isocyanate compounds. Different from general bulk products such as toluene diisocyanate (TDI) and diphenylmethane diisocyanate (MDI), they are mostly aliphatic and cycloaliphatic in structure, and also include some specially modified aromatic isocyanates. Such products generally have outstanding advantages such as yellowing resistance, excellent weather resistance, high mechanical strength, chemical corrosion resistance, low volatility, low toxicity and adjustable reactivity. However, their synthesis process is complex, production control is strict, purification is difficult, and their technical barriers and investment thresholds are significantly higher than those of general isocyanates. The global market size of Specialty Isocyanates reached USD 4300 million in 2025.

Specialty isocyanates are a high-value-added segment in the isocyanate industry. Although they account for only about 10% of the global isocyanate market by volume, they contribute nearly 20% of the industry's output value due to their high-performance advantages. The industry is highly concentrated and features an oligopolistic structure, with leading enterprises including Covestro, BASF, Evonik, and Wanhua Chemical mastering core production technologies and major production capacities, holding more than 70% of the global market share. Competition in the sector is gradually shifting from capacity expansion to formulation systems and downstream customer certification.

Chinese companies are accelerating capacity expansion to catch up rapidly, yet high-end electronic-grade and modified specialty products remain dominated by European manufacturers. Driven by the upgrading of high-end automotive coatings, the iteration of wind and photovoltaic new energy packaging materials, stricter global environmental regulations, and the substitution of low-VOC water-based materials, the specialty isocyanate market enjoys steady structural growth. Its compound annual growth rate will continue to rise from 2025 to 2030, outperforming bulk isocyanate products. Featuring small volume but high profitability and promising prospects, specialty isocyanates represent a 'value highland' in the isocyanate system.

This report is a detailed and comprehensive analysis for global Specialty Isocyanates market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Molecular Structure 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 Specialty Isocyanates market size and forecasts, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Specialty Isocyanates market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Specialty Isocyanates market size and forecasts, by Molecular Structure and by Application, in consumption value (\$ Million), sales quantity (kg), and average selling prices (US\$/kg), 2021-2032

Global Specialty Isocyanates market shares of main players, shipments in revenue (\$ Million), sales quantity (kg), and ASP (US\$/kg), 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 Specialty Isocyanates

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 Specialty Isocyanates 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, Wanhua Chemical, Evonik, Huntsman, Tosoh, Mitsui Chemicals, Asahi Kasei, Vencorex, etc.

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

Market Segmentation

Specialty Isocyanates market is split by Molecular Structure and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Molecular Structure, 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 Molecular Structure

Aromatic Isocyanates

Aliphatic Isocyanates

Cycloaliphatic Isocyanates

Others

Market segment by Functionality

Monofunctional isocyanate

Difunctional isocyanate

Polyfunctional isocyanate

Others

Market segment by Application

High weather-resistant isocyanates

Low VOC eco-friendly isocyanates

Highly functional crosslinking isocyanates

Medical and biocompatible special isocyanates

Others

Major players covered

Covestro

BASF

Wanhua Chemical

Evonik

Huntsman

Tosoh

Mitsui Chemicals

Asahi Kasei

Vencorex

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 Specialty Isocyanates product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Specialty Isocyanates 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 Molecular Structure and by Application, with sales market share and growth rate by Molecular Structure, 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 Specialty Isocyanates market forecast, by regions, by Molecular Structure, 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 Specialty Isocyanates.

Chapter 14 and 15, to describe Specialty Isocyanates sales channel, distributors, customers, research findings and conclusion.

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