

Global TDI Trimer 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 TDI Trimer market size was valued at US\$ 129 million in 2025 and is forecast to a readjusted size of US\$ 170 million by 2032 with a CAGR of 4.0% during review period.

TDI trimer is an aromatic polyisocyanate curing agent produced through the catalytic trimerization of toluene diisocyanate (TDI). Its molecular structure typically contains an isocyanurate ring and multiple reactive isocyanate groups, enabling it to react with hydroxyl-functional resins, polyester polyols, acrylic polyols, alkyd resins, polyether polyols, and other active-hydrogen-containing systems to form crosslinked polyurethane networks. Commercial TDI trimer products are commonly supplied as solvent-borne liquid hardeners, low free-TDI grades, high-solids grades, or blended polyisocyanate curing agents. Key product specifications include NCO content, solid content, free TDI monomer level, viscosity, color, solvent composition, storage stability, resin compatibility, and application performance. This research focuses on TDI isocyanurate-type trimer products used in two-component polyurethane coatings, wood coatings, industrial coatings, adhesives, leather finishing, inks, and selected elastomer systems, where they function primarily as crosslinkers and hardeners to improve film hardness, drying speed, chemical resistance, adhesion, and mechanical performance.

Based on our research, the TDI trimer industry is best understood as a mature niche segment within the polyurethane hardener and polyisocyanate curing agent market, rather than a simple extension of the TDI monomer business. Its core value comes from the isocyanurate-type aromatic polyisocyanate structure formed through TDI trimerization, which enables crosslinking with hydroxyl-functional resins, polyols, and other active-hydrogen-containing systems. This gives TDI trimer important performance advantages in hardness development, drying speed, solvent resistance, adhesion, and

mechanical strength. Compared with aliphatic or cycloaliphatic polyisocyanates such as HDI trimer and IPDI trimer, TDI trimer is generally more cost-effective and reactive, but it is weaker in non-yellowing performance, outdoor weatherability, and occupational health positioning. As a result, its core applications are concentrated in wood coatings, general industrial coatings, adhesives, leather finishing, inks, and cost-sensitive two-component polyurethane systems, rather than premium outdoor coatings or high-end automotive coatings.

From a supply perspective, the TDI trimer market is less transparent than the HDI trimer market or the broader isocyanate industry. A large number of product listings in the market come from hardener suppliers, compounders, distributors, and repackagers, so supplier screening must distinguish genuine producers from trading companies. Companies with stronger evidence for TDI trimer or TDI-based isocyanurate products include Shaoguan Dongsan Synthetic Material, Wuhan Shiquanxing New Material Technology, SAPICI / Sun Chemical, and Wanhua Chemical as a relevant isocyanate leader with related HDI-TDI polyisocyanate product lines requiring further grade-level verification. Dongsan and Shiquanxing currently have more direct public product evidence, while SAPICI has stronger evidence in aromatic TDI-based isocyanurate and mixed TDI/HDI isocyanurate systems. By contrast, Covestro, Tosoh, Mitsui Chemicals, and Asahi Kasei should be treated more cautiously under the narrow TDI trimer scope, because public evidence more clearly supports their positions in HDI trimers, IPDI systems, TDI monomers, special isocyanates, or adjacent polyisocyanate products rather than confirmed TDI trimer grades.

From a demand perspective, TDI trimer remains closely tied to traditional two-component polyurethane applications, particularly wood coatings, furniture coatings, general industrial coatings, adhesives, leather finishing, and selected ink or elastomer systems. China is an important market because its furniture, wood coating, polyurethane hardener, and regional coating supply chains are relatively complete, supporting a large number of local hardener producers and formulators. In Europe, Japan, and North America, demand is more shaped by low free-monomer requirements, labeling compliance, occupational exposure control, and the gradual shift toward higher-performance or lower-emission alternatives. As the coatings industry moves toward lower VOC, waterborne systems, high-solids formulations, and lower residual monomer content, TDI trimer is unlikely to show aggressive volume growth. Instead, demand will increasingly favor low free-TDI grades, high-solids products, modified blends, and customer-specific hardener solutions.

From a competitive trend perspective, the industry is moving away from simple price

competition toward a more capability-driven model. Key differentiators will include free TDI monomer reduction, NCO stability, resin compatibility, solvent system optimization, color and viscosity control, low-VOC formulation support, and application-level technical service. Standard TDI trimer grades will continue to serve cost-sensitive wood coating and general industrial coating markets, but higher-end customers will increasingly evaluate suppliers based on safety, stability, compliance documentation, and formulation support. Genuine manufacturers with trimerization process control, post-treatment capability, and batch consistency will be better positioned than pure distributors or repackagers. Overall, TDI trimer should be viewed as a mature but still relevant polyurethane hardener segment, with moderate growth and meaningful product-upgrade opportunities in low-monomer, high-solids, modified, and application-specific grades.

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

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

Global TDI Trimer market size and forecasts, by Product Chemistry and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global TDI Trimer 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 TDI Trimer

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 TDI Trimer 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 Shaoguan Dongsen Synthetic Material Co., Ltd., Wuhan Shiquanxing New Material Technology Co., Ltd., SAPICI, Wanhua Chemical Group Co., Ltd., etc.

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

Market Segmentation

TDI Trimer market is split by Product Chemistry and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Chemistry, 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 Product Chemistry

TDI Isocyanurate Trimer

Low Free-Monomer TDI Trimer

Solvent-borne TDI Trimer

Modified TDI Trimer

Market segment by Free TDI Monomer Content

Standard Free-Monomer Grade

Low Free-Monomer Grade

Ultra-low Free-Monomer Grade

Market segment by Raw Material System

2,4-TDI-based Trimer

TDI-80/20-based Trimer

Mixed TDI Isomer-based Trimer

TDI-based Modified System

Market segment by Application

Wood Coatings

General Industrial Coatings

Adhesives

Leather Finishing

Printing Inks

Elastomers / Sealants

Major players covered

Shaoguan Dongsan Synthetic Material Co., Ltd.

Wuhan Shiquanxing New Material Technology Co., Ltd.

SAPICI

Wanhua Chemical Group Co., Ltd.

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 TDI Trimer product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the TDI Trimer 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 Product Chemistry and by Application, with sales market share and growth rate by Product Chemistry, 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 TDI Trimer market forecast, by regions, by Product Chemistry, 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 TDI Trimer.

Chapter 14 and 15, to describe TDI Trimer sales channel, distributors, customers, research findings and conclusion.

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