

Global Toluene Diisocyanate (TDI) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Toluene Diisocyanate (TDI) market size is expected to reach \$ 7269 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

Toluene diisocyanate (TDI) is a member of the diisocyanate family associated with polyurethane chemistry. It is often marketed as 80/20 and 65/35 mixtures of the 2,4 and 2,6 isomers respectively.

TDI is one of the main raw materials for polyurethane and an upstream raw material for the production of sponges, polyurethane adhesives and sealants. The TDI production route includes liquid-phase phosgenation and gas-phase phosgenation. Currently, only Covestro uses the gas-phase method, and other devices are liquid-phase methods. There are steps such as nitration, photochemical reaction, and hydrogenation in the TDI reaction process, which has high technical barriers.

Globally, TDI production facilities are mainly distributed in China, Japan, South Korea, Germany, Hungary and the United States. China is the largest TDI producer, accounting for about 45% of the market share. Wanhua Chemical is the world's largest TDI producer, with a total TDI production capacity of 0.95 million tons/year in 2023. In 2024, Wanhua Chemical announced the TDI expansion plan for the Fujian base. After the project expansion is completed, Wanhua Chemical's total TDI production capacity is expected to reach 1.42 million tons/year. With BASF closing its German TDI plant in 2023 and Wanhua Chemical acquiring Yantai Juli's TDI business, the global TDI industry concentration will be further improved.

Market Drivers

Increasing Demand from the Polyurethane Industry: The primary market driver for Toluene Diisocyanate (TDI) is its extensive use in the production of polyurethane (PU) products. TDI is a key raw material for flexible polyurethane foams, which are widely used in furniture, bedding, and automotive seating. The growing construction and automotive industries, driven by increasing urbanization and rising disposable incomes, have led to heightened demand for flexible PU foams. TDI is also used in coatings, adhesives, sealants, and elastomers (CASE applications), further contributing to its market growth.

Growth in the Furniture and Bedding Sectors: The rising consumer preference for comfort and the increasing demand for high-quality mattresses and furniture have boosted the need for flexible polyurethane foam, driving the TDI market. The expansion of e-commerce and the trend toward online shopping for home furnishings have also accelerated the demand for PU foam-based products. With the global shift towards more comfortable and ergonomic furniture, TDI consumption is expected to rise in the production of cushions, mattresses, and upholstered furniture.

Rising Automotive Industry Demand: The automotive industry's growth, particularly in emerging markets, is a significant driver for TDI. The use of flexible polyurethane foam in automotive interiors, such as seat cushions, headrests, and soundproofing materials, enhances comfort and safety. As the global automotive industry moves toward electric vehicles (EVs), the need for lightweight materials like PU foam is increasing to enhance fuel efficiency and range, further boosting the demand for TDI.

This report studies the global Toluene Diisocyanate (TDI) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Toluene Diisocyanate (TDI) 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 Toluene Diisocyanate (TDI) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Toluene Diisocyanate (TDI) total production and demand, 2021-2032, (K MT)

Global Toluene Diisocyanate (TDI) total production value, 2021-2032, (USD Million)

Global Toluene Diisocyanate (TDI) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Toluene Diisocyanate (TDI) consumption by region & country, CAGR, 2021-2032

& (K MT)

U.S. VS China: Toluene Diisocynate (TDI) domestic production, consumption, key domestic manufacturers and share

Global Toluene Diisocynate (TDI) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Toluene Diisocynate (TDI) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Toluene Diisocynate (TDI) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Toluene Diisocynate (TDI) 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, Mitsui Chemicals, Covestro, Hanwha Chemical, Cangzhou Dahua, Gansu Yinguang Juyin, OCI, GNFC, Dow, 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 Toluene Diisocynate (TDI) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Toluene Diisocynate (TDI) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Toluene Diisocyanate (TDI) Market, Segmentation by Type:

TDI 80/20

TDI 65/35

TDI 100

Global Toluene Diisocyanate (TDI) Market, Segmentation by Application:

Flexible Polyurethane Foams

Coating

Adhesives & Sealants

Others

Companies Profiled:

Wanhua Chemical

BASF

Mitsui Chemicals

Covestro

Hanwha Chemical

Cangzhou Dahua

Gansu Yinguang Juyin

OCI

GNFC

Dow

SABIC

Karoon Petrochemical Company

Key Questions Answered:

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

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