

Global Toluene Diisocynate (TDI) Market 2025 by Manufacturers, Regions, Type and Application, Forecast to 2031

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Abstracts

According to our (Global Info Research) latest study, the global Toluene Diisocynate (TDI) market size was valued at US\$ 5015 million in 2024 and is forecast to a readjusted size of USD 6958 million by 2031 with a CAGR of 4.8% during review period.

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 is a detailed and comprehensive analysis for global Toluene Diisocyanate (TDI) 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 Toluene Diisocyanate (TDI) market size and forecasts, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2020-2031

Global Toluene Diisocynate (TDI) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2020-2031

Global Toluene Diisocynate (TDI) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K MT), and average selling prices (USD/MT), 2020-2031

Global Toluene Diisocynate (TDI) market shares of main players, shipments in revenue (\$ Million), sales quantity (K MT), and ASP (USD/MT), 2020-2025

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 Toluene Diisocynate (TDI)

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 Toluene Diisocynate (TDI) 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 Wanhua Chemical, BASF, Mitsui Chemicals, Covestro, Hanwha Chemical, Cangzhou Dahua, Gansu Yinguang Juyin, OCI, GNFC, etc.

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

Market Segmentation

Toluene Diisocynate (TDI) market is split by Type and by Application. For the period 2020-2031, 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

TDI 80/20

TDI 65/35

TDI 100

Market segment by Application

Flexible Polyurethane Foams

Coating

Adhesives & Sealants

Others

Major players covered

Wanhua Chemical

BASF

Mitsui Chemicals

Covestro

Hanwha Chemical

Cangzhou Dahua

Gansu Yinguang Juyin

OCI

GNFC

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 Toluene Diisocynate (TDI) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Toluene Diisocynate (TDI), with price, sales quantity, revenue, and global market share of Toluene Diisocynate (TDI) from 2020 to 2025.

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

Chapter 4, the Toluene Diisocynate (TDI) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2020 to 2031.

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 2020 to 2031.

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 2020 to 2025. and Toluene Diisocynate (TDI) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2026 to 2031.

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 Toluene Diisocyanate (TDI).

Chapter 14 and 15, to describe Toluene Diisocyanate (TDI) sales channel, distributors, customers, research findings and conclusion.

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