

# Global Xylylene Diisocyanate (XDI) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Xylylene Diisocyanate (XDI) market size is expected to reach \$ 296 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

Xylylene Diisocyanate (XDI) is a specialty diisocyanate used mainly as a reactive building block and curing agent in polyurethane (PU) chemistry.

From a market definition point of view, the XDI market is the value chain of producing and selling XDI (and closely related XDI-based reactive products) into applications where it reacts with polyols or other active-hydrogen materials to form polyurethane networks. This market includes (1) monomer XDI sold as a raw material, and (2) XDI derivatives such as adducts, trimers, and prepolymers that are formulated to give better handling, lower volatility, or lower free monomer content while keeping XDI's performance advantages. On the demand side, XDI is usually not consumed in commodity foams like TDI/MDI; instead it appears more in high value performance polyurethane systems, especially as a curing agent/hardener for coatings and in specialty adhesives where durability, clarity, and stable appearance matter. Mitsui Chemicals, for example, positions XDI and related isocyanates (including H6XDI) as specialty materials for polyurethane adhesives, dispersions, and coatings, emphasizing fast curing plus flexibility, heat resistance, and chemical resistance, with solvent-based, non-solvent, and water-based grade options.

On the supply chain side, XDI is a phosgene-route isocyanate, which strongly shapes both cost structure and industry barriers. The standard industrial logic for diisocyanates is to convert a corresponding diamine into an isocyanate using phosgene; patents describing XDI production explicitly describe phosgenation of xylylene diamine (XDA) to produce XDI. Academic discussion of alternative non-phosgene approaches often starts by noting that industrial isocyanates (including the xylylene family) are commonly made via phosgene chemistry and that phosgene creates safety and environmental

challenges, which is one reason researchers explore routes such as carbamate pathways. In market terms, this means XDI production tends to sit with companies that already have deep capabilities in hazardous chemistry management, process containment, and purification?especially because high-performance coating/adhesive customers are sensitive to trace impurities that can affect color, odor, stability, and cure behavior.

In 2025, global Xylylene Diisocyanate (XDI) production reached approximately 5421 MT, with an average global market price of around US\$ 30.7 per kg. The global single-line production capacity ranges from 300 to 500 MT per year. The industry's gross profit margin is approximately 30%-35%.

The most visible recent market signal is that demand for XDI as a non-yellowing coating hardener has been strong enough to trigger capacity actions.

A second trend is that XDI is increasingly discussed as part of the broader move toward higher-end polyurethane coatings and functional coatings where durability and look are critical. When a coating is expected to face sunlight, heat, chemicals, or repeated cleaning, yellowing and gloss loss become immediate customer complaints, especially in clear coats, bright colors, or transparent protective layers. In such applications, formulators often value isocyanates that combine light stability with efficient curing and strong crosslink density. Supplier positioning for XDI emphasizes exactly these points?fast cure, hardness, heat resistance, chemical resistance, and yellowing resistance?so growth in premium industrial coatings (including protective and functional layers) is a straightforward driver for XDI consumption. Practically, this can show up in more two-component (2K) systems, faster line speeds, and thinner but tougher coatings where the hardener must react reliably and still keep a clean appearance.

Another demand driver is the steady expansion of specialty polyurethane adhesives and dispersions, where XDI-type isocyanates can be used either as building blocks or as crosslinkers to improve heat resistance, chemical resistance, and final bond strength. Mitsui?s own polyurethane materials page explicitly links XDI and its derivatives to adhesives and dispersions, including solvent-based, non-solvent, and water-based grades. This matters because adhesives and dispersions are often pulled by lightweighting trends (bonding replacing mechanical fasteners), multi-material products (plastics + metals + composites), and tighter performance requirements (higher service temperature, better solvent resistance, longer durability). When customers push for ?stronger bonds that still look clean and don?t discolor,? XDI-like chemistries become more attractive than simple commodity choices, especially in high-end assembly and functional lamination.

Global Xylylene Diisocyanate (XDI) key players include Mitsui Chemicals, Hangzhou Brown Bio-Pharm, Wanhua Chemical Group, and Beijing Yuji Science & Technology, etc.

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

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

### **Highlights and key features of the study**

Global Xylylene Diisocyanate (XDI) total production and demand, 2021-2032, (MT)

Global Xylylene Diisocyanate (XDI) total production value, 2021-2032, (USD Million)

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

Global Xylylene Diisocyanate (XDI) consumption by region & country, CAGR, 2021-2032 & (MT)

U.S. VS China: Xylylene Diisocyanate (XDI) domestic production, consumption, key domestic manufacturers and share

Global Xylylene Diisocyanate (XDI) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)

Global Xylylene Diisocyanate (XDI) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (MT)

Global Xylylene Diisocyanate (XDI) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Xylylene Diisocyanate (XDI) 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 Mitsui Chemicals, Hangzhou Brown Bio-Pharm, Wanhua Chemical Group, Beijing Yuji Science & Technology, GANSU YINGUANG JUYIN CHEMICAL INDUSTRY, Levima Group, Hanwha Solutions, 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 Xylylene Diisocyanate (XDI) market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (US\$/kg) 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 Xylylene Diisocyanate (XDI) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Xylylene Diisocyanate (XDI) Market, Segmentation by Type:

XDI Monomer

XDI Prepolymer

#### Global Xylylene Diisocyanate (XDI) Market, Segmentation by Isomer:

m-XDI

p-XDI

XDI Isomer Blends

#### Global Xylylene Diisocyanate (XDI) Market, Segmentation by Viscosity:

Low-viscosity Grades

Medium-viscosity Grades

## High-viscosity Grades

### Global Xylylene Diisocyanate (XDI) Market, Segmentation by Sales Channel:

Online

Offline

### Global Xylylene Diisocyanate (XDI) Market, Segmentation by Application:

Spectacle Lenses

Coatings and Binders

Automobile (Cushioning Material)

Semiconductor (Light Pad)

Food Packaging

Membrane Material

Others

### **Companies Profiled:**

Mitsui Chemicals

Hangzhou Brown Bio-Pharm

Wanhua Chemical Group

Beijing Yuji Science & Technology

**GANSU YINGUANG JUYIN CHEMICAL INDUSTRY**

Levima Group

Hanwha Solutions

**Key Questions Answered:**

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

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