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Global Isocyanate Market Growth 2025-2031

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Abstracts

The global Isocyanate market size is predicted to grow from US$ 37270 million in 2025 to US$ 61520 million in 2031; it is expected to grow at a CAGR of 8.7% from 2025 to 2031.

The impact of the latest U.S. tariff measures and the corresponding policy responses from countries worldwide on market competitiveness, regional economic performance, and supply chain configurations will be comprehensively evaluated in this report.

Isocyanates can be classified into two subgroups: aromatic diisocyanates and aliphatic diisocyanates. The main aromatic ones are 4,4'-diphenylmethane diisocyanate (MDI) and toluene diisocyanate (TDI). Regarding the aliphatic hardeners, three main chemicals must be mentioned: 1,6-hexamethylene diisocyanate (HDI), isophorone diisocyanate (IPDI), and the hydrogenated MDI 4,4'-dicyclohexane diisocyanate (H12-MDI).

Isocyanates, particularly diisocyanates such as TDI (toluene diisocyanate) and MDI (methylene diphenyl diisocyanate), are key raw materials in the production of polyurethane foams, coatings, adhesives, and sealants. The automotive industry is one of the largest consumers of these products, using them in car interiors, seat cushions, insulation, and adhesives for various components. The expanding automotive sector, driven by increasing vehicle production and rising consumer demand for comfort and safety, is fueling the demand for isocyanates. Isocyanates are widely used in the construction industry for the production of rigid and flexible polyurethane foams, insulation materials, coatings, and adhesives. The construction sector's growth, led by urbanization, industrialization, and government investments in infrastructure development, generates a significant demand for isocyanates. These materials offer thermal insulation, adhesion, and moisture resistance properties, making them suitable for construction applications. Polyurethane foams, which require isocyanates as a

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component, play a crucial role in the furniture and bedding industry. Isocyanates are used in the production of comfortable and durable mattresses, cushions, sofas, and chairs. With the rising disposable income and changing lifestyles, the demand for furniture and bedding products is increasing, driving the demand for isocyanates. Isocyanates are utilized in the production of insulating foams, coatings, and adhesives for appliances and electronic devices. These materials provide thermal insulation, electrical insulation, and protective coatings, ensuring the efficiency and reliability of appliances and electronic products. With the continuous advancements in technology and the increasing adoption of smart home appliances and electronics, the demand for isocyanates is expected to grow. Isocyanates are essential components in the formulation of high-performance coatings, providing durability, chemical resistance, and weatherability. They are particularly used in two-component polyurethane coatings, which find applications in automotive refinishing, industrial coatings, and architectural paints. As industries and consumers increasingly demand high-quality finishes and long-lasting coatings, the demand for isocyanates in the paints and coatings industry is rising. Ongoing research and development activities in the field of isocyanates focus on developing improved and sustainable alternatives with reduced health and environmental impacts. Innovations such as low-VOC (volatile organic compounds) coatings, water-based polyurethane systems, and bio-based isocyanates are gaining attention. These advancements drive market growth by meeting stringent regulations, addressing customer concerns, and providing eco-friendly solutions. The demand for isocyanates is increasing in emerging economies, such as China, India, and Southeast Asian countries, due to rapid industrialization, urbanization, and infrastructure development. These regions are witnessing significant growth in automotive production, construction activities, and the manufacturing sector, leading to higher demand for isocyanates. The isocyanate market is influenced by stringent regulations aimed at reducing harmful emissions and promoting environmental sustainability. Regulatory bodies impose restrictions on the use and emissions of certain isocyanate compounds, driving the industry to develop safer and more sustainable alternatives. Environmentally friendly isocyanate derivatives, such as waterborne polyurethane systems, are gaining popularity as they offer reduced emissions and improved safety profiles.

LP Information, Inc. (LPI) ' newest research report, the “Isocyanate Industry Forecast” looks at past sales and reviews total world Isocyanate sales in 2024, providing a comprehensive analysis by region and market sector of projected Isocyanate sales for 2025 through 2031. With Isocyanate sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Isocyanate industry.

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This Insight Report provides a comprehensive analysis of the global Isocyanate landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Isocyanate portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Isocyanate market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Isocyanate and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Isocyanate.

This report presents a comprehensive overview, market shares, and growth opportunities of Isocyanate market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Methylene Diphenyl Diisocyanate (MDI)

Toluene Diisocyanate (TDI)

Aliphatic Isocyanate

Segmentation by Application:

Rigid Foam

Flexible Foam

Paints and Coatings

Adhesives and Sealants

Elastomers

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Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

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Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Wanhua Chemical

BASF

Covestro

Dow

Huntsman

Mitsui Chemicals

Tosoh

Kumho Mitsui Chemicals

Hanwha

Evonik

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Asahi Kasei

SABIC

Gujarat Narmada Valley Fertilizers & Chemicals (GNFC)

DIC

Karoon Petrochemical Company (KRNPC)

OCI

Cangzhou Dahua Group

Gansu Yinguang Chemical (Norinco Group)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Isocyanate market?
What factors are driving Isocyanate market growth, globally and by region?
Which technologies are poised for the fastest growth by market and region?
How do Isocyanate market opportunities vary by end market size?
How does Isocyanate break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Isocyanate Annual Sales 2020-2031
  2.1.2 World Current & Future Analysis for Isocyanate by Geographic Region, 2020, 2024 & 2031
  2.1.3 World Current & Future Analysis for Isocyanate by Country/Region, 2020, 2024 & 2031
2.2 Isocyanate Segment by Type
  2.2.1 Methylene Diphenyl Diisocyanate (MDI)
  2.2.2 Toluene Diisocyanate (TDI)
  2.2.3 Aliphatic Isocyanate
2.3 Isocyanate Sales by Type
  2.3.1 Global Isocyanate Sales Market Share by Type (2020-2025)
  2.3.2 Global Isocyanate Revenue and Market Share by Type (2020-2025)
  2.3.3 Global Isocyanate Sale Price by Type (2020-2025)
2.4 Isocyanate Segment by Application
  2.4.1 Rigid Foam
  2.4.2 Flexible Foam
  2.4.3 Paints and Coatings
  2.4.4 Adhesives and Sealants
  2.4.5 Elastomers
  2.4.6 Others
2.5 Isocyanate Sales by Application
  2.5.1 Global Isocyanate Sale Market Share by Application (2020-2025)
  2.5.2 Global Isocyanate Revenue and Market Share by Application (2020-2025)

+357 96 030922
info@marketpublishers.com

2.5.3 Global Isocyanate Sale Price by Application (2020-2025)

3 GLOBAL BY COMPANY

3.1 Global Isocyanate Breakdown Data by Company
3.1.1 Global Isocyanate Annual Sales by Company (2020-2025)
3.1.2 Global Isocyanate Sales Market Share by Company (2020-2025)
3.2 Global Isocyanate Annual Revenue by Company (2020-2025)
3.2.1 Global Isocyanate Revenue by Company (2020-2025)
3.2.2 Global Isocyanate Revenue Market Share by Company (2020-2025)
3.3 Global Isocyanate Sale Price by Company
3.4 Key Manufacturers Isocyanate Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Isocyanate Product Location Distribution
3.4.2 Players Isocyanate Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2023-2025)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ISOCYANATE BY GEOGRAPHIC REGION

4.1 World Historic Isocyanate Market Size by Geographic Region (2020-2025)
4.1.1 Global Isocyanate Annual Sales by Geographic Region (2020-2025)
4.1.2 Global Isocyanate Annual Revenue by Geographic Region (2020-2025)
4.2 World Historic Isocyanate Market Size by Country/Region (2020-2025)
4.2.1 Global Isocyanate Annual Sales by Country/Region (2020-2025)
4.2.2 Global Isocyanate Annual Revenue by Country/Region (2020-2025)
4.3 Americas Isocyanate Sales Growth
4.4 APAC Isocyanate Sales Growth
4.5 Europe Isocyanate Sales Growth
4.6 Middle East & Africa Isocyanate Sales Growth

5 AMERICAS

5.1 Americas Isocyanate Sales by Country
5.1.1 Americas Isocyanate Sales by Country (2020-2025)
5.1.2 Americas Isocyanate Revenue by Country (2020-2025)

+357 96 030922
info@marketpublishers.com

5.2 Americas Isocyanate Sales by Type (2020-2025)
5.3 Americas Isocyanate Sales by Application (2020-2025)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Isocyanate Sales by Region
  6.1.1 APAC Isocyanate Sales by Region (2020-2025)
  6.1.2 APAC Isocyanate Revenue by Region (2020-2025)
6.2 APAC Isocyanate Sales by Type (2020-2025)
6.3 APAC Isocyanate Sales by Application (2020-2025)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Isocyanate by Country
  7.1.1 Europe Isocyanate Sales by Country (2020-2025)
  7.1.2 Europe Isocyanate Revenue by Country (2020-2025)
7.2 Europe Isocyanate Sales by Type (2020-2025)
7.3 Europe Isocyanate Sales by Application (2020-2025)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Isocyanate by Country
  8.1.1 Middle East & Africa Isocyanate Sales by Country (2020-2025)

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8.1.2 Middle East & Africa Isocyanate Revenue by Country (2020-2025)
8.2 Middle East & Africa Isocyanate Sales by Type (2020-2025)
8.3 Middle East & Africa Isocyanate Sales by Application (2020-2025)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Isocyanate
10.3 Manufacturing Process Analysis of Isocyanate
10.4 Industry Chain Structure of Isocyanate

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
11.1.1 Direct Channels
11.1.2 Indirect Channels
11.2 Isocyanate Distributors
11.3 Isocyanate Customer

12 WORLD FORECAST REVIEW FOR ISOCYANATE BY GEOGRAPHIC REGION

12.1 Global Isocyanate Market Size Forecast by Region
12.1.1 Global Isocyanate Forecast by Region (2026-2031)
12.1.2 Global Isocyanate Annual Revenue Forecast by Region (2026-2031)
12.2 Americas Forecast by Country (2026-2031)
12.3 APAC Forecast by Region (2026-2031)
12.4 Europe Forecast by Country (2026-2031)
12.5 Middle East & Africa Forecast by Country (2026-2031)

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info@marketpublishers.com

12.6 Global Isocyanate Forecast by Type (2026-2031)
12.7 Global Isocyanate Forecast by Application (2026-2031)

13 KEY PLAYERS ANALYSIS

13.1 Wanhua Chemical
13.1.1 Wanhua Chemical Company Information
13.1.2 Wanhua Chemical Isocyanate Product Portfolios and Specifications
13.1.3 Wanhua Chemical Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.1.4 Wanhua Chemical Main Business Overview
13.1.5 Wanhua Chemical Latest Developments
13.2 BASF
13.2.1 BASF Company Information
13.2.2 BASF Isocyanate Product Portfolios and Specifications
13.2.3 BASF Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.2.4 BASF Main Business Overview
13.2.5 BASF Latest Developments
13.3 Covestro
13.3.1 Covestro Company Information
13.3.2 Covestro Isocyanate Product Portfolios and Specifications
13.3.3 Covestro Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.3.4 Covestro Main Business Overview
13.3.5 Covestro Latest Developments
13.4 Dow
13.4.1 Dow Company Information
13.4.2 Dow Isocyanate Product Portfolios and Specifications
13.4.3 Dow Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.4.4 Dow Main Business Overview
13.4.5 Dow Latest Developments
13.5 Huntsman
13.5.1 Huntsman Company Information
13.5.2 Huntsman Isocyanate Product Portfolios and Specifications
13.5.3 Huntsman Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.5.4 Huntsman Main Business Overview
13.5.5 Huntsman Latest Developments
13.6 Mitsui Chemicals
13.6.1 Mitsui Chemicals Company Information
13.6.2 Mitsui Chemicals Isocyanate Product Portfolios and Specifications

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13.6.3 Mitsui Chemicals Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.6.4 Mitsui Chemicals Main Business Overview
13.6.5 Mitsui Chemicals Latest Developments
13.7 Tosoh
13.7.1 Tosoh Company Information
13.7.2 Tosoh Isocyanate Product Portfolios and Specifications
13.7.3 Tosoh Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.7.4 Tosoh Main Business Overview
13.7.5 Tosoh Latest Developments
13.8 Kumho Mitsui Chemicals
13.8.1 Kumho Mitsui Chemicals Company Information
13.8.2 Kumho Mitsui Chemicals Isocyanate Product Portfolios and Specifications
13.8.3 Kumho Mitsui Chemicals Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.8.4 Kumho Mitsui Chemicals Main Business Overview
13.8.5 Kumho Mitsui Chemicals Latest Developments
13.9 Hanwha
13.9.1 Hanwha Company Information
13.9.2 Hanwha Isocyanate Product Portfolios and Specifications
13.9.3 Hanwha Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.9.4 Hanwha Main Business Overview
13.9.5 Hanwha Latest Developments
13.10 Evonik
13.10.1 Evonik Company Information
13.10.2 Evonik Isocyanate Product Portfolios and Specifications
13.10.3 Evonik Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.10.4 Evonik Main Business Overview
13.10.5 Evonik Latest Developments
13.11 Asahi Kasei
13.11.1 Asahi Kasei Company Information
13.11.2 Asahi Kasei Isocyanate Product Portfolios and Specifications
13.11.3 Asahi Kasei Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.11.4 Asahi Kasei Main Business Overview
13.11.5 Asahi Kasei Latest Developments
13.12 SABIC
13.12.1 SABIC Company Information
13.12.2 SABIC Isocyanate Product Portfolios and Specifications
13.12.3 SABIC Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)

+357 96 030922
info@marketpublishers.com

13.12.4 SABIC Main Business Overview
13.12.5 SABIC Latest Developments
13.13 Gujarat Narmada Valley Fertilizers & Chemicals (GNFC)
13.13.1 Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Company Information
13.13.2 Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Isocyanate Product Portfolios and Specifications
13.13.3 Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.13.4 Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Main Business Overview
13.13.5 Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Latest Developments
13.14 DIC
13.14.1 DIC Company Information
13.14.2 DIC Isocyanate Product Portfolios and Specifications
13.14.3 DIC Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.14.4 DIC Main Business Overview
13.14.5 DIC Latest Developments
13.15 Karoon Petrochemical Company (KRNPC)
13.15.1 Karoon Petrochemical Company (KRNPC) Company Information
13.15.2 Karoon Petrochemical Company (KRNPC) Isocyanate Product Portfolios and Specifications
13.15.3 Karoon Petrochemical Company (KRNPC) Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.15.4 Karoon Petrochemical Company (KRNPC) Main Business Overview
13.15.5 Karoon Petrochemical Company (KRNPC) Latest Developments
13.16 OCI
13.16.1 OCI Company Information
13.16.2 OCI Isocyanate Product Portfolios and Specifications
13.16.3 OCI Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.16.4 OCI Main Business Overview
13.16.5 OCI Latest Developments
13.17 Cangzhou Dahua Group
13.17.1 Cangzhou Dahua Group Company Information
13.17.2 Cangzhou Dahua Group Isocyanate Product Portfolios and Specifications
13.17.3 Cangzhou Dahua Group Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.17.4 Cangzhou Dahua Group Main Business Overview
13.17.5 Cangzhou Dahua Group Latest Developments
13.18 Gansu Yinguang Chemical (Norinco Group)

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info@marketpublishers.com

13.18.1 Gansu Yinguang Chemical (Norinco Group) Company Information
13.18.2 Gansu Yinguang Chemical (Norinco Group) Isocyanate Product Portfolios and Specifications
13.18.3 Gansu Yinguang Chemical (Norinco Group) Isocyanate Sales, Revenue, Price and Gross Margin (2020-2025)
13.18.4 Gansu Yinguang Chemical (Norinco Group) Main Business Overview
13.18.5 Gansu Yinguang Chemical (Norinco Group) Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Isocyanate Annual Sales CAGR by Geographic Region (2020, 2024 & 2031) & ($ millions)
Table 2. Isocyanate Annual Sales CAGR by Country/Region (2020, 2024 & 2031) & ($ millions)
Table 3. Major Players of Methylene Diphenyl Diisocyanate (MDI)
Table 4. Major Players of Toluene Diisocyanate (TDI)
Table 5. Major Players of Aliphatic Isocyanate
Table 6. Global Isocyanate Sales by Type (2020-2025) & (Kilotons)
Table 7. Global Isocyanate Sales Market Share by Type (2020-2025)
Table 8. Global Isocyanate Revenue by Type (2020-2025) & ($ million)
Table 9. Global Isocyanate Revenue Market Share by Type (2020-2025)
Table 10. Global Isocyanate Sale Price by Type (2020-2025) & (US$/Ton)
Table 11. Global Isocyanate Sale by Application (2020-2025) & (Kilotons)
Table 12. Global Isocyanate Sale Market Share by Application (2020-2025)
Table 13. Global Isocyanate Revenue by Application (2020-2025) & ($ million)
Table 14. Global Isocyanate Revenue Market Share by Application (2020-2025)
Table 15. Global Isocyanate Sale Price by Application (2020-2025) & (US$/Ton)
Table 16. Global Isocyanate Sales by Company (2020-2025) & (Kilotons)
Table 17. Global Isocyanate Sales Market Share by Company (2020-2025)
Table 18. Global Isocyanate Revenue by Company (2020-2025) & ($ millions)
Table 19. Global Isocyanate Revenue Market Share by Company (2020-2025)
Table 20. Global Isocyanate Sale Price by Company (2020-2025) & (US$/Ton)
Table 21. Key Manufacturers Isocyanate Producing Area Distribution and Sales Area
Table 22. Players Isocyanate Products Offered
Table 23. Isocyanate Concentration Ratio (CR3, CR5 and CR10) & (2023-2025)
Table 24. New Products and Potential Entrants
Table 25. Market M&A Activity & Strategy
Table 26. Global Isocyanate Sales by Geographic Region (2020-2025) & (Kilotons)
Table 27. Global Isocyanate Sales Market Share Geographic Region (2020-2025)
Table 28. Global Isocyanate Revenue by Geographic Region (2020-2025) & ($ millions)
Table 29. Global Isocyanate Revenue Market Share by Geographic Region (2020-2025)
Table 30. Global Isocyanate Sales by Country/Region (2020-2025) & (Kilotons)
Table 31. Global Isocyanate Sales Market Share by Country/Region (2020-2025)
Table 32. Global Isocyanate Revenue by Country/Region (2020-2025) & ($ millions)
Table 33. Global Isocyanate Revenue Market Share by Country/Region (2020-2025)

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Table 34. Americas Isocyanate Sales by Country (2020-2025) & (Kilotons)
Table 35. Americas Isocyanate Sales Market Share by Country (2020-2025)
Table 36. Americas Isocyanate Revenue by Country (2020-2025) & ($ millions)
Table 37. Americas Isocyanate Sales by Type (2020-2025) & (Kilotons)
Table 38. Americas Isocyanate Sales by Application (2020-2025) & (Kilotons)
Table 39. APAC Isocyanate Sales by Region (2020-2025) & (Kilotons)
Table 40. APAC Isocyanate Sales Market Share by Region (2020-2025)
Table 41. APAC Isocyanate Revenue by Region (2020-2025) & ($ millions)
Table 42. APAC Isocyanate Sales by Type (2020-2025) & (Kilotons)
Table 43. APAC Isocyanate Sales by Application (2020-2025) & (Kilotons)
Table 44. Europe Isocyanate Sales by Country (2020-2025) & (Kilotons)
Table 45. Europe Isocyanate Revenue by Country (2020-2025) & ($ millions)
Table 46. Europe Isocyanate Sales by Type (2020-2025) & (Kilotons)
Table 47. Europe Isocyanate Sales by Application (2020-2025) & (Kilotons)
Table 48. Middle East & Africa Isocyanate Sales by Country (2020-2025) & (Kilotons)
Table 49. Middle East & Africa Isocyanate Revenue Market Share by Country (2020-2025)
Table 50. Middle East & Africa Isocyanate Sales by Type (2020-2025) & (Kilotons)
Table 51. Middle East & Africa Isocyanate Sales by Application (2020-2025) & (Kilotons)
Table 52. Key Market Drivers & Growth Opportunities of Isocyanate
Table 53. Key Market Challenges & Risks of Isocyanate
Table 54. Key Industry Trends of Isocyanate
Table 55. Isocyanate Raw Material
Table 56. Key Suppliers of Raw Materials
Table 57. Isocyanate Distributors List
Table 58. Isocyanate Customer List
Table 59. Global Isocyanate Sales Forecast by Region (2026-2031) & (Kilotons)
Table 60. Global Isocyanate Revenue Forecast by Region (2026-2031) & ($ millions)
Table 61. Americas Isocyanate Sales Forecast by Country (2026-2031) & (Kilotons)
Table 62. Americas Isocyanate Annual Revenue Forecast by Country (2026-2031) & ($ millions)
Table 63. APAC Isocyanate Sales Forecast by Region (2026-2031) & (Kilotons)
Table 64. APAC Isocyanate Annual Revenue Forecast by Region (2026-2031) & ($ millions)
Table 65. Europe Isocyanate Sales Forecast by Country (2026-2031) & (Kilotons)
Table 66. Europe Isocyanate Revenue Forecast by Country (2026-2031) & ($ millions)
Table 67. Middle East & Africa Isocyanate Sales Forecast by Country (2026-2031) & (Kilotons)

+357 96 030922
info@marketpublishers.com

Table 68. Middle East & Africa Isocyanate Revenue Forecast by Country (2026-2031) & ($ millions)
Table 69. Global Isocyanate Sales Forecast by Type (2026-2031) & (Kilotons)
Table 70. Global Isocyanate Revenue Forecast by Type (2026-2031) & ($ millions)
Table 71. Global Isocyanate Sales Forecast by Application (2026-2031) & (Kilotons)
Table 72. Global Isocyanate Revenue Forecast by Application (2026-2031) & ($ millions)
Table 73. Wanhua Chemical Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 74. Wanhua Chemical Isocyanate Product Portfolios and Specifications
Table 75. Wanhua Chemical Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 76. Wanhua Chemical Main Business
Table 77. Wanhua Chemical Latest Developments
Table 78. BASF Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 79. BASF Isocyanate Product Portfolios and Specifications
Table 80. BASF Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 81. BASF Main Business
Table 82. BASF Latest Developments
Table 83. Covestro Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 84. Covestro Isocyanate Product Portfolios and Specifications
Table 85. Covestro Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 86. Covestro Main Business
Table 87. Covestro Latest Developments
Table 88. Dow Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 89. Dow Isocyanate Product Portfolios and Specifications
Table 90. Dow Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 91. Dow Main Business
Table 92. Dow Latest Developments
Table 93. Huntsman Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 94. Huntsman Isocyanate Product Portfolios and Specifications
Table 95. Huntsman Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton)

+357 96 030922
info@marketpublishers.com

and Gross Margin (2020-2025)
Table 96. Huntsman Main Business
Table 97. Huntsman Latest Developments
Table 98. Mitsui Chemicals Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 99. Mitsui Chemicals Isocyanate Product Portfolios and Specifications
Table 100. Mitsui Chemicals Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 101. Mitsui Chemicals Main Business
Table 102. Mitsui Chemicals Latest Developments
Table 103. Tosoh Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 104. Tosoh Isocyanate Product Portfolios and Specifications
Table 105. Tosoh Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 106. Tosoh Main Business
Table 107. Tosoh Latest Developments
Table 108. Kumho Mitsui Chemicals Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 109. Kumho Mitsui Chemicals Isocyanate Product Portfolios and Specifications
Table 110. Kumho Mitsui Chemicals Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 111. Kumho Mitsui Chemicals Main Business
Table 112. Kumho Mitsui Chemicals Latest Developments
Table 113. Hanwha Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 114. Hanwha Isocyanate Product Portfolios and Specifications
Table 115. Hanwha Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 116. Hanwha Main Business
Table 117. Hanwha Latest Developments
Table 118. Evonik Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 119. Evonik Isocyanate Product Portfolios and Specifications
Table 120. Evonik Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 121. Evonik Main Business
Table 122. Evonik Latest Developments
Table 123. Asahi Kasei Basic Information, Isocyanate Manufacturing Base, Sales Area

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and Its Competitors
Table 124. Asahi Kasei Isocyanate Product Portfolios and Specifications
Table 125. Asahi Kasei Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 126. Asahi Kasei Main Business
Table 127. Asahi Kasei Latest Developments
Table 128. SABIC Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 129. SABIC Isocyanate Product Portfolios and Specifications
Table 130. SABIC Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 131. SABIC Main Business
Table 132. SABIC Latest Developments
Table 133. Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 134. Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Isocyanate Product Portfolios and Specifications
Table 135. Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 136. Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Main Business
Table 137. Gujarat Narmada Valley Fertilizers & Chemicals (GNFC) Latest Developments
Table 138. DIC Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 139. DIC Isocyanate Product Portfolios and Specifications
Table 140. DIC Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 141. DIC Main Business
Table 142. DIC Latest Developments
Table 143. Karoon Petrochemical Company (KRNPC) Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 144. Karoon Petrochemical Company (KRNPC) Isocyanate Product Portfolios and Specifications
Table 145. Karoon Petrochemical Company (KRNPC) Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 146. Karoon Petrochemical Company (KRNPC) Main Business
Table 147. Karoon Petrochemical Company (KRNPC) Latest Developments
Table 148. OCI Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors

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Table 149. OCI Isocyanate Product Portfolios and Specifications
Table 150. OCI Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 151. OCI Main Business
Table 152. OCI Latest Developments
Table 153. Cangzhou Dahua Group Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 154. Cangzhou Dahua Group Isocyanate Product Portfolios and Specifications
Table 155. Cangzhou Dahua Group Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 156. Cangzhou Dahua Group Main Business
Table 157. Cangzhou Dahua Group Latest Developments
Table 158. Gansu Yinguang Chemical (Norinco Group) Basic Information, Isocyanate Manufacturing Base, Sales Area and Its Competitors
Table 159. Gansu Yinguang Chemical (Norinco Group) Isocyanate Product Portfolios and Specifications
Table 160. Gansu Yinguang Chemical (Norinco Group) Isocyanate Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2020-2025)
Table 161. Gansu Yinguang Chemical (Norinco Group) Main Business
Table 162. Gansu Yinguang Chemical (Norinco Group) Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Isocyanate
Figure 2. Isocyanate Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Isocyanate Sales Growth Rate 2020-2031 (Kilotons)
Figure 7. Global Isocyanate Revenue Growth Rate 2020-2031 ($ millions)
Figure 8. Isocyanate Sales by Geographic Region (2020, 2024 & 2031) & ($ millions)
Figure 9. Isocyanate Sales Market Share by Country/Region (2024)
Figure 10. Isocyanate Sales Market Share by Country/Region (2020, 2024 & 2031)
Figure 11. Product Picture of Methylene Diphenyl Diisocyanate (MDI)
Figure 12. Product Picture of Toluene Diisocyanate (TDI)
Figure 13. Product Picture of Aliphatic Isocyanate
Figure 14. Global Isocyanate Sales Market Share by Type in 2025
Figure 15. Global Isocyanate Revenue Market Share by Type (2020-2025)
Figure 16. Isocyanate Consumed in Rigid Foam
Figure 17. Global Isocyanate Market: Rigid Foam (2020-2025) & (Kilotons)
Figure 18. Isocyanate Consumed in Flexible Foam
Figure 19. Global Isocyanate Market: Flexible Foam (2020-2025) & (Kilotons)
Figure 20. Isocyanate Consumed in Paints and Coatings
Figure 21. Global Isocyanate Market: Paints and Coatings (2020-2025) & (Kilotons)
Figure 22. Isocyanate Consumed in Adhesives and Sealants
Figure 23. Global Isocyanate Market: Adhesives and Sealants (2020-2025) & (Kilotons)
Figure 24. Isocyanate Consumed in Elastomers
Figure 25. Global Isocyanate Market: Elastomers (2020-2025) & (Kilotons)
Figure 26. Isocyanate Consumed in Others
Figure 27. Global Isocyanate Market: Others (2020-2025) & (Kilotons)
Figure 28. Global Isocyanate Sale Market Share by Application (2024)
Figure 29. Global Isocyanate Revenue Market Share by Application in 2025
Figure 30. Isocyanate Sales by Company in 2025 (Kilotons)
Figure 31. Global Isocyanate Sales Market Share by Company in 2025
Figure 32. Isocyanate Revenue by Company in 2025 ($ millions)
Figure 33. Global Isocyanate Revenue Market Share by Company in 2025
Figure 34. Global Isocyanate Sales Market Share by Geographic Region (2020-2025)
Figure 35. Global Isocyanate Revenue Market Share by Geographic Region in 2025

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Figure 36. Americas Isocyanate Sales 2020-2025 (Kilotons)
Figure 37. Americas Isocyanate Revenue 2020-2025 ($ millions)
Figure 38. APAC Isocyanate Sales 2020-2025 (Kilotons)
Figure 39. APAC Isocyanate Revenue 2020-2025 ($ millions)
Figure 40. Europe Isocyanate Sales 2020-2025 (Kilotons)
Figure 41. Europe Isocyanate Revenue 2020-2025 ($ millions)
Figure 42. Middle East & Africa Isocyanate Sales 2020-2025 (Kilotons)
Figure 43. Middle East & Africa Isocyanate Revenue 2020-2025 ($ millions)
Figure 44. Americas Isocyanate Sales Market Share by Country in 2025
Figure 45. Americas Isocyanate Revenue Market Share by Country (2020-2025)
Figure 46. Americas Isocyanate Sales Market Share by Type (2020-2025)
Figure 47. Americas Isocyanate Sales Market Share by Application (2020-2025)
Figure 48. United States Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 49. Canada Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 50. Mexico Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 51. Brazil Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 52. APAC Isocyanate Sales Market Share by Region in 2025
Figure 53. APAC Isocyanate Revenue Market Share by Region (2020-2025)
Figure 54. APAC Isocyanate Sales Market Share by Type (2020-2025)
Figure 55. APAC Isocyanate Sales Market Share by Application (2020-2025)
Figure 56. China Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 57. Japan Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 58. South Korea Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 59. Southeast Asia Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 60. India Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 61. Australia Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 62. China Taiwan Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 63. Europe Isocyanate Sales Market Share by Country in 2025
Figure 64. Europe Isocyanate Revenue Market Share by Country (2020-2025)
Figure 65. Europe Isocyanate Sales Market Share by Type (2020-2025)
Figure 66. Europe Isocyanate Sales Market Share by Application (2020-2025)
Figure 67. Germany Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 68. France Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 69. UK Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 70. Italy Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 71. Russia Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 72. Middle East & Africa Isocyanate Sales Market Share by Country (2020-2025)
Figure 73. Middle East & Africa Isocyanate Sales Market Share by Type (2020-2025)
Figure 74. Middle East & Africa Isocyanate Sales Market Share by Application

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(2020-2025)
Figure 75. Egypt Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 76. South Africa Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 77. Israel Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 78. Turkey Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 79. GCC Countries Isocyanate Revenue Growth 2020-2025 ($ millions)
Figure 80. Manufacturing Cost Structure Analysis of Isocyanate in 2025
Figure 81. Manufacturing Process Analysis of Isocyanate
Figure 82. Industry Chain Structure of Isocyanate
Figure 83. Channels of Distribution
Figure 84. Global Isocyanate Sales Market Forecast by Region (2026-2031)
Figure 85. Global Isocyanate Revenue Market Share Forecast by Region (2026-2031)
Figure 86. Global Isocyanate Sales Market Share Forecast by Type (2026-2031)
Figure 87. Global Isocyanate Revenue Market Share Forecast by Type (2026-2031)
Figure 88. Global Isocyanate Sales Market Share Forecast by Application (2026-2031)
Figure 89. Global Isocyanate Revenue Market Share Forecast by Application (2026-2031)

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