

# Isocyanates Market Size is Projected to Reach US\$ 59.01 Billion by 2035 With a CAGR of 6.0% | Fact.MR

*Isocyanates market to witness strong growth through 2035, driven by demand in construction, automotive, and shift toward sustainable polyurethane products.*

ROCKVILLE, MD, UNITED STATES, June 17, 2025 /EINPresswire.com/ -- The global [isocyanates market](#) is projected to reach a value of USD 32.92 billion by 2025 and is expected to grow at a CAGR of 6.0%, attaining USD 59.01 billion by 2035. Growth is primarily

driven by increasing demand from the automotive and construction sectors, where isocyanate-based foams, adhesives, sealants, and elastomers are widely used for their performance and durability.

Regulatory developments, especially across the European Union and North America, are pushing manufacturers to develop lower-VOC and eco-friendlier alternatives. In response, key industry players such as Huntsman Corporation, Dow Inc., BASF SE, and Covestro AG are channeling investments into green chemistry innovations, including bio-based isocyanates. These sustainable solutions are anticipated to play a central role in the future of the isocyanates market, helping companies comply with evolving environmental regulations while maintaining high-performance product standards, as highlighted by the OECD.

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## Isocyanates Demand Analysis and Impact Across the Value Chain

The isocyanates market functions within a complex value chain involving upstream producers, downstream manufacturers, investors, regulators, and end-users. Each stakeholder group contributes uniquely to shaping industry dynamics, from regulatory adherence and capital flow



to innovation and operational efficiency.

At the top of the chain are producers of key raw materials such as toluene diisocyanate (TDI) and methylene diphenyl diisocyanate (MDI). These upstream manufacturers hold significant influence over pricing structures and supply capacity. Large chemical companies with integrated operations and advanced R&D capabilities possess the greatest negotiating power. Their scale allows them to dictate terms across the chain, ensuring industry stability while also setting the pace for new technology adoption and sustainability practices.

## Isocyanates Industry Analysis Across Key Countries

According to Fact.MR, the U.S. isocyanates market is projected to grow at a CAGR of 6.2% from 2025 to 2035, driven by high demand in the construction and automotive sectors. Rapid infrastructure development—spanning housing, transport, energy, and manufacturing—is fueling consumption. Additionally, rising interest in energy-efficient buildings and increased use of polyurethane foams in vehicles for insulation are boosting demand. The EPA's strict environmental policies are also accelerating the shift toward green polyurethane solutions.

In the U.K., the isocyanates industry is expected to expand at a 5.8% CAGR during the same period, supported by a robust automotive sector and a national focus on sustainable building practices. Market growth is underpinned by both the strength of established players and the growing market share of emerging firms.

Italy's isocyanates market is forecast to grow at a 5.5% CAGR from 2025 to 2035. Growth is fueled by the country's deep-rooted process engineering expertise, cost-efficient manufacturing, and a favorable environment for both domestic and international businesses. The rising emphasis on sustainable construction and the automotive industry's use of polyurethane products further contributes to the market's upward trajectory.

## Key Players

The Dow Chemical Company

Covestro AG

BASF SE

Alpek S.A.B. De C.V.

Trinseo S.A.

Huntsman Corporation

Mitsui Chemicals

Wanhua Industrial Group Co., Ltd

Borsod Chem

Cangzhou Dahua Co. Ltd.

Hanwha Chemical

Fujian Dongnan Industrial Group Co., Ltd.

## Key Strategies

To meet rising competition and evolving industry demands, companies in the isocyanates market are intensifying their focus on innovation, sustainability, and product performance. Significant investments in research and development aim to improve product efficiency while minimizing environmental impact. As sustainability becomes central to consumer preferences and is reinforced by stringent environmental regulations, many firms are transitioning toward eco-friendly solutions.

To stay ahead, companies are forming strategic alliances with technology providers, enabling them to adopt automation, artificial intelligence (AI), and data analytics. These technologies enhance production processes, improve product quality, and optimize operational efficiency.

Investors are actively seeking high-growth opportunities in emerging markets, focusing particularly on firms with strong ESG (Environmental, Social, and Governance) ratings. With sustainability now a key criterion in investment decisions, ESG performance is increasingly influencing capital flow.

Hedging raw material price volatility has become another strategic priority, as companies aim to safeguard margins amid fluctuating costs. At the same time, regulators are tightening oversight to close compliance gaps and ensure fair competition through stricter enforcement of environmental standards. Together, these strategies are reshaping the competitive landscape and pushing the industry toward a more sustainable and technologically advanced future.

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## Segmentation

By Type :

MDI

TDI

Aliphatic and Cycloaliphatic

By Application :

Surface Coatings

Elastomers

Binders

By End-Use :

Automotive

Building & Construction

Electronics

Others (Industrial Machinery, Packaging, etc. )

By Region :  
North America  
Latin America  
Europe  
Asia Pacific  
MEA

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The [polyamine-based solvents market](#) will grow from USD 167.4 million in 2024 to USD 977.9 million by 2035, at a CAGR of 17.3%.

The [capsule grouts market](#) is set to rise from USD 615.6 million in 2024 to USD 1,088 million by 2035, growing at a CAGR of 5.4% due to expanding infrastructure, mining, and safety needs.

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