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Global PI Core Monomer Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global PI Core Monomer market size was valued at US$ 1252 million in 2025 and is forecast to a readjusted size of US$ 1870 million by 2032 with a CAGR of 5.8% during review period.

PI core monomers are the high-purity dianhydrides and diamines used to synthesize polyimide through polycondensation and subsequent imidization. Main dianhydrides include PMDA, BPDA, BTDA, ODPA, 6FDA, CBDA, CHDA and HPMDA, while representative diamines include ODA, PPD, BAPP, DDS, TFMB, 6FODA and TPE-R. Their molecular structures determine the final polymer's heat resistance, dimensional stability, dielectric behavior, transparency, flexibility, solubility and processability. Because polyimides are designed for demanding thermal, electrical and mechanical environments, monomer purity, isomer control, metal-ion content and batch consistency are critical. These materials serve as the chemical foundation for films, varnishes, fibers, coatings, adhesives and molded polyimide products worldwide.

Global production capacity is approximately 100 thousand tons.

In 2025, global sales reached approximately 81 thousand tons, with an average price of around US$ 15 per kg, gross margin around 33%.

The PI core monomer market is a specialized, technology-intensive segment with modest volumes but high value per kilogram. Demand is anchored by polyimide films, flexible circuits, electrical insulation, semiconductor packaging, advanced composites and high-temperature coatings. Standard monomers such as PMDA and ODA remain volume leaders, while BPDA, 6FDA, TFMB and other specialty structures command

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higher prices because they enable low dielectric loss, low thermal expansion, optical transparency or improved solubility. Competition is fragmented by product grade and customer qualification. Asian suppliers dominate manufacturing capacity, while Japanese, American and European companies remain strong in high-purity formulations, proprietary chemistry and downstream applications.

Market Trend

The market is moving from general-purpose monomers toward application-specific, ultra-high-purity grades. Growth is strongest in low-CTE materials for advanced packaging, low-dielectric polyimides for high-frequency communications, colorless systems for flexible displays, and thermoplastic or soluble polyimides for easier processing. Producers are also improving metal-ion control, particle filtration, isomer purity and traceability to satisfy semiconductor and electronics customers. Supply chains are becoming more regional as customers seek security of supply and dual sourcing. At the same time, Chinese producers are expanding from commodity PMDA and ODA into BPDA, 6FDA, TFMB and custom monomers, increasing competition while accelerating localization of high-end polyimide materials.

Market Drive

Growth is driven by electronics miniaturization, flexible circuitry, semiconductor packaging, electric vehicles, aerospace systems and high-temperature industrial equipment. Polyimide films and coatings are valued because they maintain electrical, thermal, chemical and mechanical performance in severe conditions. Expansion of flexible printed circuits, redistribution layers, chip packaging, battery insulation, traction motors and 5G or high-frequency devices raises demand for monomers that provide low dielectric loss, low thermal expansion and strong dimensional stability. Material substitution also matters: polyimide increasingly replaces conventional plastics, glass or insulation materials where flexibility, light weight and heat resistance are required. Semiconductor-localization and advanced-material policies also stimulate investment globally.

Upstream and Downstream

Upstream participants include producers of aromatic hydrocarbons, fluorinated intermediates, catalysts, solvents and refining reagents, followed by specialist manufacturers of dianhydrides and diamines. Their competitiveness depends on feedstock integration, purification technology, hazardous-process control and consistent

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electronic-grade quality. UBE is an example of an integrated producer using internally manufactured BPDA in polyimide materials. Downstream companies include polyimide film, resin, varnish, fiber, adhesive, flexible-laminate and semiconductor-material manufacturers. DuPont and Kaneka supply polyimide films for electrical insulation, flexible circuits, displays and other high-performance uses. Demand therefore flows from electronics, automotive, aerospace, energy and industrial customers back through formulators to qualified core-monomer suppliers worldwide globally.

Report Scope

This report is a detailed and comprehensive analysis for global PI Core Monomer 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 PI Core Monomer market size and forecasts, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/kg), 2021-2032

Global PI Core Monomer market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/kg), 2021-2032

Global PI Core Monomer market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Kilotons), and average selling prices (US$/kg), 2021-2032

Global PI Core Monomer market shares of main players, shipments in revenue ($ Million), sales quantity (Kilotons), and ASP (US$/kg), 2021-2026

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 PI Core Monomer

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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 PI Core Monomer 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 Anupam Rasayan India Limited, Mitsubishi Chemical Group Corporation, Hebei Haili Evergreen New Materials Co., Ltd., Wakayama Seika Holdings Co., Ltd., Changzhou Sunlight Pharmaceutical Co., Ltd., Shenzhen Capchem Technology Co., Ltd., Shandong Guansen Polymers Materials Science And Technology Co., Ltd., Puyang Hengfeng Electronic Insulation Materials Co., Ltd., Arxada AG, Dongying Mingde Chemical Co., Ltd.*, etc.

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

Market Segmentation

PI Core Monomer market is split by Type and by Application. For the period 2021-2032, 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

Dianhydride Monomers

Diamine Monomers

Market segment by Monomer Family

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PMDA

BPDA

BTDA

6FDA

ODA

BAPP

TFMB

Others

Market segment by Channel

Direct Sales

Distribution

Market segment by Application

Polyimide Films

PI Resins, Molded Parts and Composites

PI Coatings and Varnishes

Polyimide Fibers

Others

Major players covered

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Anupam Rasayan India Limited

Mitsubishi Chemical Group Corporation

Hebei Haili Evergreen New Materials Co., Ltd.

Wakayama Seika Holdings Co., Ltd.

Changzhou Sunlight Pharmaceutical Co., Ltd.

Shenzhen Capchem Technology Co., Ltd.

Shandong Guansen Polymers Materials Science And Technology Co., Ltd.

Puyang Hengfeng Electronic Insulation Materials Co., Ltd.

Arxada AG

Dongying Mingde Chemical Co., Ltd.*

Tianjin Chinatech Material Technology Co., Ltd.

Hualun New Materials (Jiangsu) Co., Ltd.

CECEP Valiant Co., Ltd.

Zigong Zhongtiansheng New Material Technology Co., Ltd.*

Xi’an Manareco New Materials Co., Ltd.

Hunan Beihong New Materials Co., Ltd.*

Tsaker New Energy Tech Co., Limited

Daikin Industries, Ltd.

JFE Holdings, Inc.

UBE Corporation

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Shanghai Guchuang Chemical New Materials Co., Ltd.*

Shandong Ouya New Materials Technology Co., Ltd.*

Wanda Holding Group Co., Ltd.

Dalian Longxiang Catalytic Chemical Co., Ltd.*

Shijiazhuang Hope Technology Co., Ltd.

Puyang Longdeyang New Materials Co., Ltd.

Puyang Shenghuade Chemical Co., Ltd.

Shandong Helishi Petrochemical Technology Development Co., Ltd.*

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)

Chapter Outline

Chapter 1, to describe PI Core Monomer product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of PI Core Monomer, with price, sales

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quantity, revenue, and global market share of PI Core Monomer from 2021 to 2026.

Chapter 3, the PI Core Monomer competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the PI Core Monomer breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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 2021 to 2032.

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 2021 to 2026.and PI Core Monomer market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

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 PI Core Monomer.

Chapter 14 and 15, to describe PI Core Monomer sales channel, distributors, customers, research findings and conclusion.

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