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Global PI Core Monomer Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global PI Core Monomer market size is expected to reach $ 1870 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

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 higher prices because they enable low dielectric loss, low thermal expansion, optical transparency or improved solubility. Competition is fragmented by product grade and

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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 electronic-grade quality. UBE is an example of an integrated producer using internally manufactured BPDA in polyimide materials. Downstream companies include polyimide

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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 studies the global PI Core Monomer production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for PI Core Monomer 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 PI Core Monomer that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global PI Core Monomer total production and demand, 2021-2032, (Kilotons)

Global PI Core Monomer total production value, 2021-2032, (USD Million)

Global PI Core Monomer production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global PI Core Monomer consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: PI Core Monomer domestic production, consumption, key domestic manufacturers and share

Global PI Core Monomer production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global PI Core Monomer production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global PI Core Monomer production by Application, production, value, CAGR,

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2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global PI Core Monomer 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World PI Core Monomer market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) 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 PI Core Monomer Market, By Region:

United States

China

Europe

Japan

South Korea

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ASEAN

India

Rest of World

Global PI Core Monomer Market, Segmentation by Type:

Dianhydride Monomers

Diamine Monomers

Global PI Core Monomer Market, Segmentation by Monomer Family:

PMDA

BPDA

BTDA

6FDA

ODA

BAPP

TFMB

Others

Global PI Core Monomer Market, Segmentation by Channel:

Direct Sales

Distribution

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Global PI Core Monomer Market, Segmentation by Application:

Polyimide Films

PI Resins, Molded Parts and Composites

PI Coatings and Varnishes

Polyimide Fibers

Others

Companies Profiled:

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.

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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

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.*

Key Questions Answered:

1. How big is the global PI Core Monomer market?

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2. What is the demand of the global PI Core Monomer market?
3. What is the year over year growth of the global PI Core Monomer market?
4. What is the production and production value of the global PI Core Monomer market?
5. Who are the key producers in the global PI Core Monomer market?
6. What are the growth factors driving the market demand?

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