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Global S-Epichlorohydrin Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global S-Epichlorohydrin market size is expected to reach $ 77.26 million by 2032, rising at a market growth of 5.4% CAGR during the forecast period (2026-2032).

S-Epichlorohydrin is the single S-enantiomer of epichlorohydrin and is identified by CAS No. 67843-74-7. It contains both a reactive epoxide group and a chloromethyl group, making it an important three-carbon chiral building block for the synthesis of chiral alcohols, amines and oxygen-containing heterocycles. Commercial material is primarily manufactured through Salen-cobalt-catalyzed hydrolytic kinetic resolution of racemic epichlorohydrin, although enzymatic resolution and other asymmetric processes may also be used. Key specifications include chemical purity, enantiomeric excess, water content, residual opposite enantiomer, catalyst residues and batch-to-batch consistency.

The upstream chain includes racemic epichlorohydrin, Salen-cobalt catalysts, solvents, process water, distillation systems and hazardous-material packaging. Midstream activities comprise kinetic resolution, catalyst recovery, purification, chiral analysis and quality release. Downstream applications include L-carnitine and carnitronitrile intermediates, as well as chiral intermediates associated with rivaroxaban, landiolol, atorvastatin and other pharmaceutical or specialty chemical products. S-Epichlorohydrin occupies the value-added intermediate stage between commodity epichlorohydrin and complex chiral pharmaceutical intermediates. Profitability is driven by stereochemical control, process yield, regulatory compliance, customer qualification and supply reliability rather than by raw-material conversion alone.

Global S-Epichlorohydrin production is projected to reach approximately 8,000 tons in 2025, with a weighted average FOB price of approximately US$6,500 per ton and a

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manufacturing gross margin of approximately 24% to 34%.

In China, S-Epichlorohydrin key players include Jinma Chem, Huayang Pharm, Gold Jyouki Tech, Yetop Fine Chem, etc. Global top four manufacturers hold a share over 60%. Northeast is the largest market, with a share over 35%, followed by Central China, and East China, both have a share about 55 percent. In terms of product, 98%-98.9% is the largest segment, with a share about 50%. And in terms of application, the largest application is L-carnitine, followed by Atrovastatine, etc.

Market Opportunities, Challenges And Downstream Demand Trends

S-Epichlorohydrin is evolving from a conventional chiral intermediate into a strategically important building block within pharmaceutical supply chains. Tighter controls over enantiomeric impurities, starting-material traceability and supplier-change management strengthen the pricing position of manufacturers capable of delivering consistent stereochemical purity, reliable batch quality and audit support. L-carnitine remains a major demand source, while synthetic routes associated with rivaroxaban, landiolol and other chiral pharmaceutical products provide additional diversification. Jinjiuqi has established thousand-ton-scale output and a broader chiral epoxide portfolio, while Hubei Chuwei integrates S-Epichlorohydrin into carnitronitrile and L-carnitine production. These developments indicate a shift from standalone intermediate sales toward integrated value-chain competition.

The central industry constraint is not the existence of downstream demand but the balance among resolution yield, hazardous-chemical compliance and new capacity. Hydrolytic kinetic resolution generally retains only about half of the feedstock as the target enantiomer, and the economic treatment of the opposite enantiomer and glycol byproducts materially affects total production cost. Epichlorohydrin also requires enclosed processing, solvent and distillation recovery, emissions control and compliant hazardous-material storage. At the same time, a planned 5,000-metric-ton Chinese project could create price and utilization pressure if new capacity enters the market faster than qualified pharmaceutical demand.

Downstream procurement is expected to shift from spot-price comparison toward long-term supply agreements and quality-system integration. Customers increasingly evaluate unknown impurity profiles, residual catalyst levels, feedstock routes, change-control systems and continuous batch data in addition to chemical purity and enantiomeric excess. Manufacturers capable of recovering catalysts, increasing target-enantiomer yield, utilizing the opposite enantiomer and supplying both development

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quantities and multi-ton commercial batches with complete audit documentation will be best positioned to sustain margins. Competition will increasingly focus not on whether a supplier can produce the molecule, but on whether it can maintain qualified production at a stable cost.

Report Scope

This report studies the global S-Epichlorohydrin production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for S-Epichlorohydrin 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 S-Epichlorohydrin that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global S-Epichlorohydrin total production and demand, 2021-2032, (Tons)

Global S-Epichlorohydrin total production value, 2021-2032, (USD Million)

Global S-Epichlorohydrin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global S-Epichlorohydrin consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: S-Epichlorohydrin domestic production, consumption, key domestic manufacturers and share

Global S-Epichlorohydrin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global S-Epichlorohydrin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global S-Epichlorohydrin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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This report profiles key players in the global S-Epichlorohydrin 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 Sterling Pharma Solutions Limited, Aggarwwal Exports, Syntthesis With Catalysts Private Limited, Syngenesis Chemscience Private Limited, Shenyang Gold Jyouki Technology Co., Ltd., Shulan Jinma Chemical Co., Ltd., Hubei Chuwei Pharmaceutical Co., Ltd., Hunan Yetop Pharmaceutical Technology Co., Ltd., Changzhou Huaren Chemical Co., Ltd., Suqian Dewei 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 S-Epichlorohydrin market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) 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 S-Epichlorohydrin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

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India

Rest of World

Global S-Epichlorohydrin Market, Segmentation by Type:

Below 99.0% EE

99.0% To Below 99.9% EE

99.9% EE and Above

Global S-Epichlorohydrin Market, Segmentation by Chemical Purity:

Below 99.0%

99.0% to Below 99.5%

99.5% and Above

Global S-Epichlorohydrin Market, Segmentation by Raw Material Route:

Petrochemical Epichlorohydrin Feedstock

Bio-Based Glycerol Epichlorohydrin Feedstock

Others

Global S-Epichlorohydrin Market, Segmentation by Application:

L-Carnitine

Atorvastatin

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Others

Companies Profiled:

Sterling Pharma Solutions Limited

Aggarwwal Exports

Syntthesis With Catalysts Private Limited

Syngenesis Chemscience Private Limited

Shenyang Gold Jyouki Technology Co., Ltd.

Shulan Jinma Chemical Co., Ltd.

Hubei Chuwei Pharmaceutical Co., Ltd.

Hunan Yetop Pharmaceutical Technology Co., Ltd.

Changzhou Huaren Chemical Co., Ltd.

Suqian Dewei Chemical Co., Ltd.

Shanghai KeLy Bio-Pharmaceutical Co., Ltd.

Key Questions Answered:

1. How big is the global S-Epichlorohydrin market?
2. What is the demand of the global S-Epichlorohydrin market?
3. What is the year over year growth of the global S-Epichlorohydrin market?
4. What is the production and production value of the global S-Epichlorohydrin market?
5. Who are the key producers in the global S-Epichlorohydrin market?
6. What are the growth factors driving the market demand?

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