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Global Tetrachloropropene Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G83C62AC4B2FEN.html
Date: September 2026
Pages: 87
Price: US$ 4,480.00 (Single User License)
ID: G83C62AC4B2FEN

Abstracts

The global Tetrachloropropene market size is expected to reach $ 1296 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

Tetrachloropropene is a chlorinated three-carbon olefin intermediate with the molecular formula C3H2Cl4. The commercial market addressed in this study is centered on 1,1,2,3-Tetrachloropropene, also identified as HCC-1230xa, HCO-1230xa or trichloroallyl chloride, with CAS number 10436-39-2. It is generally supplied as a colorless to pale-yellow chlorinated material that may appear as a liquid or low-melting solid near ambient temperature, depending on purity and handling temperature. Industrial production typically combines chlorination, dehydrochlorination, isomerization, distillation and impurity-removal operations using chlorinated propane or propene intermediates. Tetrachloropropene is primarily used as a fluorochemical intermediate in the production chain for low-global-warming-potential hydrofluoroolefins, particularly HFO-1234yf, and is also supplied in smaller quantities for specialized organic synthesis, process development and laboratory research. The research scope covers industrial and research-grade Tetrachloropropene supplied as a merchant chemical or transferred internally within integrated chlorinated-organics and fluorochemicals manufacturing systems.

Key Findings

In 2025, global tetrachloropropene production reached approximately 11031 kg, the average price is 80 usd/g.

Research-grade 97% Tetrachloropropene generally trades at approximately

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RMB200–1,050 per gram in small packages

Industrial bulk Tetrachloropropene is quotation-based and cannot be benchmarked directly against laboratory package prices

HFO-1234yf intermediates form the central commercial demand structure for Tetrachloropropene

Asia Pacific has the broadest identified merchant supplier base while North America retains integrated strategic production

Process integration purity control and downstream qualification define the principal competitive barriers

Market Trends

The Tetrachloropropene industry is evolving from a small-volume merchant chlorinated intermediate market toward a more integrated fluorochemical feedstock system. Producers are increasingly linking Tetrachloropropene output with upstream chlorinated hydrocarbon operations and downstream hydrofluoroolefin manufacturing, reducing storage, transport and external procurement requirements. Process development is focused on improving reaction selectivity, converting undesired tetrachloropropene isomers, recycling unreacted chlorinated intermediates and lowering heavy by-product formation. Continuous processing and closed-loop material handling are becoming more important because they improve batch consistency, reduce operator exposure and support larger fluorochemical production campaigns. Customer requirements are also shifting from basic assay specifications toward detailed control of water, acidity, metal ions, stabilizers and closely boiling impurities that can affect fluorination catalysts and downstream product yield. Merchant supply will remain relevant for independent fluorochemical producers, pilot plants and specialty synthesis customers, but the market’s long-term direction favors captive or contract-linked production supported by multi-year qualification, dedicated specifications and integrated logistics.

Market Dynamics

Drivers

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The principal demand driver is the transition from conventional high-global-warming-potential hydrofluorocarbons toward next-generation refrigerants and other fluorinated working fluids. Tetrachloropropene, particularly HCC-1230xa, is an important feedstock in routes that produce HFO-1234yf through fluorination and subsequent conversion steps. Regulatory programs are accelerating this transition: the Kigali Amendment framework requires a substantial global phasedown of HFC production and consumption, the United States AIM Act establishes a stepwise HFC reduction pathway, and the European Union's Regulation 2024/573 strengthens controls on fluorinated greenhouse gases. These measures support investment in lower-GWP refrigerant supply chains and increase the strategic importance of qualified chlorinated intermediates. Additional demand is generated by replacement and expansion of mobile air-conditioning refrigerant capacity, technology licensing, regionalization of fluorochemical production and the need for secure upstream raw-material supply.

Restraints

Tetrachloropropene demand is concentrated in a limited number of fluorochemical production routes and customers, which creates exposure to downstream plant operating rates, technology choices and project schedules. Industrial material is frequently produced captively, limiting the size and transparency of the merchant market. Manufacturing requires several chlorination, dehydrochlorination, isomerization and purification steps, and small changes in reaction conditions can increase unwanted isomers, chlorinated heavy ends or corrosive impurities. Equipment must withstand chlorinated materials, hydrogen chloride and other aggressive process streams, increasing capital cost and maintenance requirements. Hazardous-material handling, emission control, wastewater treatment and transport compliance add further operating expense. The market is also constrained by limited publicly visible pricing because industrial contracts are negotiated according to purity, volume, delivery form, customer qualification and integration with downstream fluorination assets. Laboratory prices carry substantial packaging and distribution premiums and therefore provide little guidance for industrial economics.

Opportunities

The strongest opportunity lies in expanding low-GWP fluorochemical capacity and developing regional supply chains for HFO-1234yf and related fluorinated olefins. Independent producers can create value by supplying high-purity Tetrachloropropene to fluorochemical companies that lack integrated chlorinated-organics assets, while

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integrated manufacturers can improve margins through internal conversion rather than selling basic intermediates. Process optimization offers further opportunities through higher selectivity, undesired-isomer conversion, catalyst-life improvement, solvent recovery and reuse of chlorinated by-products. China's established chlor-alkali, pesticide-intermediate and fluorochemical infrastructure provides a platform for localized supply, particularly where producers can meet tighter water, acidity and trace-metal specifications. Smaller opportunities remain in process-development quantities, custom synthesis and analytical reference materials, where low volumes command substantially higher unit values. Companies capable of combining industrial production, hazardous logistics, customer-specific purification and long-term fluorination-process support are likely to secure more defensible commercial positions.

Challenges

The principal technical challenge is maintaining stable isomer composition and impurity profiles across industrial production campaigns. Tetrachloropropene intermediates may contain structurally similar chlorinated propenes and propanes with close boiling ranges, making separation and analytical control difficult. Trace water, acidity, metals or stabilizer residues can influence corrosion, storage stability and downstream fluorination-catalyst performance. Producers must also control exothermic chlorination reactions, hydrogen chloride generation, process pressure and the potential formation of high-boiling residues. Commercial qualification is lengthy because customers evaluate not only assay but also conversion yield, catalyst life and downstream HFO product quality. Intellectual-property restrictions around production and fluorination routes may limit process flexibility, while changes in refrigerant regulation or competing HFO manufacturing pathways can alter feedstock requirements. Occupational exposure is another material consideration because 1,1,2,3-Tetrachloropropene is classified as harmful through oral, dermal and inhalation exposure and can cause skin, eye and respiratory irritation.

Industry Chain Analysis

The upstream chain includes chlorine, chlorinated C1–C3 hydrocarbons, carbon tetrachloride, vinyl chloride, tetrachloroethylene, dichloromethane, chlorinated propane or propene intermediates, bases, Lewis-acid catalysts, solvents, inhibitors and process utilities. The exact material structure varies by production route. Established process concepts generally create a chlorinated propane intermediate, introduce or rearrange

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chlorine atoms, remove hydrogen chloride and convert undesired tetrachloropropene isomers into the target 1,1,2,3 configuration. Production assets include corrosion-resistant reactors, chlorination and dehydrochlorination units, distillation columns, isomerization systems, condensers, scrubbers, wastewater-treatment facilities and analytical laboratories. Upstream economics are influenced by chlorine and chlorinated feedstock availability, but selectivity, recycle efficiency, energy consumption, corrosion management and by-product disposal often have a greater effect on final manufacturing cost.

Midstream manufacturers purify Tetrachloropropene to customer specifications and supply it in drums, intermediate bulk containers, tank systems or closed internal pipelines. In integrated facilities, the material is transferred directly to fluorination units, where it reacts with hydrogen fluoride through catalytic liquid- or gas-phase processes and is converted through intermediates such as HCFO-1233xf toward HFO-1234yf. Downstream value extends into refrigerant production, refrigerant blending, automotive air-conditioning systems and other low-GWP heat-transfer applications. The largest value increase occurs after fluorination and final refrigerant purification, but upstream Tetrachloropropene quality materially affects conversion efficiency, catalyst stability and downstream separation cost. Producers with integrated chlorine, chlorinated-intermediate and fluorochemical operations can capture process synergies, while independent suppliers compete through purity, reliability, flexible packaging and geographic proximity.

Segment Insights

By grade, industrial fluorochemical-grade Tetrachloropropene represents the principal volume segment. It is supplied under customer-specific specifications and is evaluated by isomer purity, moisture, acidity, trace metals and chlorinated by-products rather than assay alone. Higher-purity process-development and research grades represent limited volume but significantly higher unit prices because they require additional purification, small-package filling, documentation and international hazardous-material distribution. Public 97% laboratory offerings indicate prices of approximately RMB200–1,050 per gram depending on package size and supplier, while commercial kilogram, drum and bulk quantities remain quotation-based.

By chemical configuration, 1,1,2,3-Tetrachloropropene or HCC-1230xa is the central product in the HFO-1234yf feedstock chain. Other tetrachloropropene isomers may appear as process intermediates, co-products or feedstocks for different fluorinated

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molecules, but they require separate specification and application treatment. By supply model, captive transfer accounts for an important portion of industrial consumption because integrated fluorochemical producers seek to control feedstock quality and logistics. Merchant sales serve independent downstream plants, regional customers, custom-synthesis companies and laboratories. Commercial differentiation therefore depends on route integration, target-isomer selectivity and customer-specific impurity control rather than on nominal product concentration alone.

Downstream Market Opportunities

The main downstream opportunity is the HFO-1234yf value chain serving mobile air conditioning and other applications requiring lower-GWP refrigerants. Tetrachloropropene suppliers benefit when new refrigerant capacity is built, existing plants improve operating rates or producers localize upstream intermediates to reduce supply risk. Opportunities also arise in contract manufacturing for fluorochemical technology owners, qualification of second-source suppliers and replacement of imported intermediates in regional markets. Secondary applications in specialized chlorinated synthesis, process research and reference materials provide attractive unit pricing but remain comparatively small. Successful suppliers must align product specifications with each customer’s fluorination route because different catalysts and reactor configurations may have distinct tolerances for water, acidity, heavy ends and trace metals.

Regional Insights

Asia Pacific has the broadest identified group of independent and merchant Tetrachloropropene suppliers, supported by China’s chlor-alkali, pesticide-intermediate, refrigerant and fluorochemical manufacturing infrastructure. Confirmed participants such as CAC Nantong Chemical, Lecron Industrial Development Group, Shandong Aofan New Material and CNSG Anhui Hongsifang reflect a regional supply structure that combines specialty chlorinated intermediates with broader chemical-production platforms. The principal regional opportunity is localization of HFO feedstocks, but commercial success requires consistent quality, safe logistics and qualification by downstream fluorochemical customers.

North America has strategic relevance through vertically integrated production and patented process technology. OxyChem identifies 4CPe as a chlorinated-organics

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product used in next-generation low-GWP and zero-ozone-depletion refrigerants, illustrating the region's integration between basic chlorinated chemicals and advanced refrigerant feedstocks. Europe represents an important downstream regulatory and refrigerant-consumption market, although the publicly visible merchant-supplier base is more limited. Regional competition is therefore differentiated: Chinese producers emphasize manufacturing availability and localization, North American integrated producers emphasize scale and technology control, while European demand is shaped strongly by refrigerant-transition requirements.

Competitive Landscape Analysis

The Tetrachloropropene market is concentrated, technically specialized and less transparent than conventional commodity chlorinated chemicals. OxyChem occupies an integrated position through its chlorinated-organics platform, proprietary 4CPe technology and connection to next-generation refrigerant feedstocks. CAC Nantong Chemical, Lecron Industrial Development Group, Shandong Aofan New Material and CNSG Anhui Hongsifang represent the identified Chinese manufacturing base, with competitive potential derived from local chlorinated-feedstock access, chemical-park infrastructure and proximity to Asian fluorochemical customers. Competition is shaped by whether material is sold externally or consumed captively, making visible merchant shipments an incomplete measure of actual production. Supplier selection depends on sustained batch consistency, target-isomer concentration, moisture and acidity control, hazardous-material logistics and downstream fluorination performance. Capacity alone does not determine market position; operating continuity, environmental compliance, intellectual-property access, customer qualification and integration with the HFO-1234yf chain are more decisive indicators of commercial strength.

Report Scope

This report studies the global Tetrachloropropene production, demand, key manufacturers, and key regions.

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

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Highlights and key features of the study

Global Tetrachloropropene total production and demand, 2021-2032, (kg)

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

Global Tetrachloropropene production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (kg), (based on production site)

Global Tetrachloropropene consumption by region & country, CAGR, 2021-2032 & (kg)

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

Global Tetrachloropropene production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (kg)

Global Tetrachloropropene production by Level, production, value, CAGR, 2021-2032, (USD Million) & (kg)

Global Tetrachloropropene production by Application, production, value, CAGR, 2021-2032, (USD Million) & (kg)

This report profiles key players in the global Tetrachloropropene 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 CAC Nantong Chemical Co., Ltd., Occidental Chemical Corporation (OxyChem), Lecron Industrial Development Group Co., Ltd., Shandong Aofan New Material Co., Ltd., CNSG Anhui Hongsifang 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 Tetrachloropropene market

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Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (kg) and average price (US$/g) by manufacturer, by Level, 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 Tetrachloropropene Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Tetrachloropropene Market, Segmentation by Level:

Fluorochemical Feedstock Grade

Agrochemical Intermediate Grade

Other Technical Grade

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Global Tetrachloropropene Market, Segmentation by Use End:

Captive-Use Tetrachloropropene

Merchant Tetrachloropropene

Custom-Synthesis Tetrachloropropene

Global Tetrachloropropene Market, Segmentation by Specification:

1,1,2,3-Tetrachloropropene

Other Tetrachloropropene Isomers

Global Tetrachloropropene Market, Segmentation by Application:

HFO-1234yf Production

Agrochemical Intermediates

Other Fluorochemical Intermediates

Others

Companies Profiled:

CAC Nantong Chemical Co., Ltd.

Occidental Chemical Corporation (OxyChem)

Lecron Industrial Development Group Co., Ltd.

Shandong Aofan New Material Co., Ltd.

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CNSG Anhui Hongsifang Co., Ltd.

Key Questions Answered:

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

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