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Global PI Core Monomer Market Growth 2026-2032

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Abstracts

The global PI Core Monomer market size is predicted to grow from US$ 1190 million in 2025 to US$ 1814 million in 2032; it is expected to grow at a CAGR of 6.1% from 2026 to 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 customer qualification. Asian suppliers dominate manufacturing capacity, while

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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 film, resin, varnish, fiber, adhesive, flexible-laminate and semiconductor-material

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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

LP Information, Inc. (LPI) ' newest research report, the “PI Core Monomer Industry Forecast” looks at past sales and reviews total world PI Core Monomer sales in 2025, providing a comprehensive analysis by region and market sector of projected PI Core Monomer sales for 2026 through 2032. With PI Core Monomer sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world PI Core Monomer industry.

This Insight Report provides a comprehensive analysis of the global PI Core Monomer landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on PI Core Monomer portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global PI Core Monomer market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for PI Core Monomer and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global PI Core Monomer.

This report presents a comprehensive overview, market shares, and growth opportunities of PI Core Monomer market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Dianhydride Monomers

Diamine Monomers

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Segmentation by Monomer Family:

PMDA

BPDA

BTDA

6FDA

ODA

BAPP

TFMB

Others

Segmentation by Channel:

Direct Sales

Distribution

Segmentation by Application:

Polyimide Films

PI Resins, Molded Parts and Composites

PI Coatings and Varnishes

Polyimide Fibers

Others

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This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia

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Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global PI Core Monomer market?

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What factors are driving PI Core Monomer market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do PI Core Monomer market opportunities vary by end market size?

How does PI Core Monomer break out by Type, by Application?

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