

# **1,2,4,5-Tetramethylbenzene (Durene) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

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## **Abstracts**

### **1,2,4,5-Tetramethylbenzene (Durene) Market Summary**

#### **Introduction**

1,2,4,5-Tetramethylbenzene, commonly known as Durene, is an aromatic hydrocarbon characterized by its four methyl groups attached to a benzene ring, making it a critical chemical intermediate in industrial applications. This compound is primarily utilized in the production of pyromellitic acid (PMA) and pyromellitic dianhydride (PMDA), with the latter being a key raw material for polyimide polymers. Polyimides are high-performance materials widely used in flexible copper clad laminates (FCCL), which serve as substrates for flexible printed circuit boards (FPCBs) in electronic devices such as smartphones and tablets. The Durene industry is marked by its concentration of production in China, where major manufacturers like Jiangsu Zhengdan Chemical Industry Co. Ltd., Yunnan Jiehua Clean Energy Development Co. Ltd., and Shandong Minghua New Materials Co. Ltd. dominate capacity, with outputs of 10,000 tons, 13,000 tons, and 20,000 tons respectively. The global market for Durene is estimated to reach USD 100-200 million in 2025, with a projected compound annual growth rate (CAGR) of 3.6%-6.2% from 2025 to 2030, driven by the expanding electronics sector and demand for advanced materials.

#### **Market Size and Growth Forecast**

The global Durene market is anticipated to be valued between USD 100-200 million in 2025, with an expected CAGR ranging from 3.6% to 6.2% through 2030. This growth is propelled by the increasing adoption of polyimides in electronics, alongside steady

demand in chemical synthesis, though tempered by regional production concentration and raw material availability.

### Regional Analysis

**Asia Pacific:** Growth is estimated at 4.0%-6.5%, with China as the dominant player due to its extensive production capacity and role as a hub for polyimide and electronics manufacturing. Japan and South Korea also contribute significantly, with trends focusing on high-tech applications in consumer electronics.

**Europe:** The market grows at 2.5%-4.5%, led by Germany and France, where demand is tied to specialty chemicals and industrial applications. Trends emphasize sustainable production methods.

**North America:** Growth is projected at 3.0%-5.0%, with the United States focusing on advanced materials for aerospace and electronics. Trends highlight innovation in polymer applications.

**Rest of the World:** Growth ranges from 2.0%-4.0%, with emerging markets like India showing potential in chemical intermediates, driven by industrial expansion.

### Application Analysis

**Pyromellitic Acid (PMA):** Growing at 3.0%-5.5%, PMA is a byproduct of Durene oxidation, used in specialty chemicals. Trends show steady demand in niche industrial applications.

**Pyromellitic Dianhydride (PMDA):** With a growth rate of 4.0%-6.5%, PMDA is the primary driver, fueled by polyimide production for FCCLs. Trends indicate rising use in high-performance electronics.

**Others:** Including organic synthesis intermediates, this segment grows at 2.5%-4.5%, with applications in coatings and resins showing moderate expansion.

### Key Market Players

**Jiangsu Zhengdan Chemical Industry Co. Ltd.:** Based in China, it specializes in chemical intermediates, with a strong focus on Durene production.

Yunnan Jiehua Clean Energy Development Co. Ltd.: In China, it leverages its capacity to serve the growing polyimide market.

Jiangsu Hualun Chemical: A Chinese firm, it focuses on aromatic compounds for industrial applications.

Nanjing Zhenxing New Energy Development: In China, it targets chemical synthesis markets with innovative solutions.

Suzhou Jiutai Group: Based in China, it provides Durene for downstream polymer industries.

Shandong Minghua New Materials Co. Ltd.: In China, it stands out with significant capacity, catering to electronics and chemical sectors.

### Porter's Five Forces Analysis

**Threat of New Entrants:** Moderate, as high capital investment and technical expertise create barriers, though China's market growth attracts new players.

**Threat of Substitutes:** Low to moderate, with few viable alternatives to Durene for PMDA production, though alternative polymers could pose long-term risks.

**Bargaining Power of Buyers:** Moderate, as large polyimide producers negotiate prices, but specialized applications limit options.

**Bargaining Power of Suppliers:** Moderate, with raw material supply concentrated in petrochemical regions, impacting costs.

**Industry Rivalry:** High, driven by competition among Chinese firms for market share and innovation in production efficiency.

### Market Opportunities and Challenges

#### Opportunities

Rising demand for polyimides in electronics, especially in Asia, boosts Durene consumption.

Expansion of flexible electronics in smartphones and wearables offers growth potential.

New capacity projects, like Shandong Beineng's 6,000-ton plan in 2024, enhance supply.

## Challenges

Production concentration in China increases vulnerability to regional disruptions.

Fluctuating petrochemical prices affect profitability.

Environmental regulations on chemical manufacturing pose compliance costs.

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