

2,3-Dichloropyridine Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

<https://marketpublishers.com/r/25A24DE2129DEN.html>

Date: March 2025

Pages: 75

Price: US\$ 3,200.00 (Single User License)

ID: 25A24DE2129DEN

Abstracts

2,3-Dichloropyridine Market Summary

Introduction

2,3-Dichloropyridine is a critical intermediate in agrochemicals and pharmaceuticals, notably used to produce pyrazole acid (a precursor for pesticides like pyraclostrobin and tolfenpyrad) and chlorantraniliprole, a high-efficacy insecticide. Nanjing Red Sun, the global leader with a 9,000-ton capacity, expanded its portfolio with a 2,000-ton chlorantraniliprole facility in 2023 and plans to scale 2,3-Dichloropyridine capacity to 40,000 tons and chlorantraniliprole to 60,000 tons by 2027, following the patent expiration of chlorantraniliprole in August 2022. Additional expansions include Bhagiradha Chemicals & Industries Ltd.'s 1,500-ton project announced in August 2024 and Zhangye Lv'an Biotechnology Co. Ltd.'s 2,000-ton facility, which broke ground in July 2024. The market is poised for significant capacity growth, though declining production costs and prices may temper market size increases relative to volume expansion, reflecting a competitive and evolving landscape.

Market Size and Growth Forecast

The global 2,3-Dichloropyridine market is projected to reach 120 to 240 million USD by 2025, with an estimated compound annual growth rate (CAGR) of 5.5% to 8.5%. This robust growth is driven by agrochemical demand, though market value growth may lag behind capacity due to anticipated price declines.

Regional Analysis

Regional trends reflect agricultural and industrial priorities:

Asia Pacific: Growth forecasted at 6.5% to 9.5%. China and India dominate, fueled by

agrochemical production for food security, with China's capacity expansions leading the charge.

Europe: Expected growth ranges from 4.5% to 7.5%. Germany and France focus on high-value agrochemicals and pharmaceuticals, emphasizing quality and regulatory compliance.

North America: Growth projected at 5.0% to 8.0%. The United States drives demand through advanced pesticide formulations and pharmaceutical R&D.

Asia Pacific leads due to its production scale, while Europe and North America prioritize specialized applications.

Application Analysis

2,3-Dichloropyridine's applications underscore its industrial significance:

Agrochemicals: Growth estimated at 6.0% to 9.0%. Dominated by chlorantraniliprole and pyrazole acid derivatives, this segment thrives on pest control needs, with Asia Pacific driving volume.

Pharmaceuticals: Projected growth of 5.0% to 8.0%. Used in niche drug synthesis, demand aligns with healthcare innovation, particularly in North America and Europe.

Others: Growth forecasted at 4.0% to 6.5%. Includes chemical intermediates, showing steady expansion.

The trend toward sustainable pest management boosts agrochemical growth, while pharmaceutical innovation supports broader use.

Key Market Players

Key producers include:

Jubilant Ingrevia Limited: An Indian firm supplying intermediates for agrochemicals and pharmaceuticals.

Nanjing Red Sun: The global leader with a 9,000-ton capacity, expanding aggressively in agrochemicals.

These companies shape the market through scale and strategic growth.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. New projects like Bhagiradha's indicate potential, but technical and regulatory barriers limit widespread entry.

Threat of Substitutes: Low. Few alternatives match 2,3-Dichloropyridine's specific synthesis roles, securing its position.

Bargaining Power of Buyers: High. Large agrochemical firms negotiate aggressively, especially as prices decline.

Bargaining Power of Suppliers: Moderate. Raw material suppliers have some leverage, balanced by availability.

Competitive Rivalry: High. Capacity expansions intensify competition, with price pressures challenging profitability.

Market Opportunities and Challenges

Opportunities:

Massive capacity growth, like Nanjing Red Sun's 40,000-ton target, taps into rising agrochemical demand.

Patent expiration of chlorantraniliprole opens markets for generic production, boosting 2,3-Dichloropyridine use.

Sustainable agriculture trends enhance its relevance in pest control.

Challenges:

Declining prices due to oversupply may compress market value growth.

Regulatory scrutiny on agrochemical intermediates increases compliance costs.

Market concentration risks supply disruptions if key producers falter.

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