

# **3-Amino-1,2-propanediol (APD) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

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## **Abstracts**

### **3-Amino-1,2-propanediol (APD) Market Summary**

#### **Introduction**

3-Amino-1,2-propanediol (APD) is a specialized chemical intermediate primarily used in the synthesis of iodinated contrast agents for computed tomography (CT) imaging, such as Iohexol, Ioversol, and Iodixanol. This compound's unique structure, featuring an amino group and two hydroxyl groups, enables it to serve as a critical building block in pharmaceutical applications, ensuring the stability and solubility of these diagnostic agents. The APD market is closely tied to the global demand for medical imaging, driven by an aging population, rising chronic disease prevalence, and advancements in diagnostic technology. CT equipment ownership varies widely—44 units per million people in the U.S., 111 in Japan, 20 in China, 30 in the EU, 12 in Brazil, and 4 in India—highlighting disparities in healthcare infrastructure that influence APD consumption.

The market operates within the niche pharmaceutical intermediates sector, characterized by high purity requirements, stringent regulatory oversight, and a concentrated supply base. As healthcare systems expand, particularly in emerging economies, APD's role in enabling precise diagnostics positions it for steady growth, though its scope remains limited by its specialized application focus.

The global 3-Amino-1,2-propanediol market is projected to reach a valuation of 40-80 million USD by 2025, with an estimated CAGR of 2.2%-4.2% through 2030, reflecting moderate growth tied to medical imaging trends.

#### **Regional Analysis**

Growth varies by region, driven by healthcare infrastructure and CT usage:

North America: Growth is estimated at 2.0%-3.8%, with the U.S. leading due to high CT

equipment density and advanced healthcare systems.

Asia Pacific: Projected growth ranges from 2.5%-4.5%, led by China's increasing CT adoption and Japan's established diagnostic market. India and other emerging economies show potential as healthcare access improves.

Europe: Anticipated growth is 2.0%-4.0%, with the EU benefiting from widespread CT use and aging populations.

Asia Pacific shows the strongest growth potential, while North America and Europe maintain steady demand.

### Application Analysis

APD's applications center on contrast agents, with limited diversity:

Iohexol: Growth is estimated at 2.2%-4.2%. A widely used CT contrast agent, it drives steady demand as diagnostic procedures grow.

Ioversol: Projected growth ranges from 2.0%-4.0%. Used in vascular imaging, it supports moderate expansion in specialized diagnostics.

Iodixanol: Growth is anticipated at 2.5%-4.5%. Favored for its safety profile, it grows with advanced imaging needs.

Others: Expected growth is 1.8%-3.5%, covering minor uses with slower growth.

### Key Market Players

Borregaard: A Norwegian firm, it supplies high-purity APD for pharmaceuticals.

Kashima Chemical: A Japanese producer, it serves the Asian diagnostic market.

Zhejiang Haizhou Pharmaceutical Co. Ltd.: With a 1,000-ton capacity, it supports China's healthcare sector.

Inner Mongolia Shengshi Chemistry Co. Ltd.: At 1,100 tons, with a 1,000-ton expansion planned, it meets growing regional demand.

### Porter's Five Forces Analysis

Threat of New Entrants: Low. High regulatory and technical barriers deter entry.

Threat of Substitutes: Low. Few alternatives match APD's role in contrast agents.

Bargaining Power of Buyers: High. Pharmaceutical firms demand stringent quality and pricing.

Bargaining Power of Suppliers: Moderate. Specialized inputs create leverage, offset by few producers.

Competitive Rivalry: Moderate. Limited players compete on quality and capacity.

### Market Opportunities and Challenges

Opportunities: Healthcare growth in Asia, aging populations, and diagnostic advancements.

Challenges: Regulatory complexity, high production costs, and niche market scope.

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