

Barbituric acid Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Barbituric Acid Market Summary

Barbituric acid, a fundamental heterocyclic compound with the molecular formula $C_4H_4N_2O_3$, serves as a critical intermediate in the synthesis of vitamins, pharmaceutical compounds, and specialized pigments. This pyrimidine derivative demonstrates exceptional versatility as a chemical building block, making it indispensable in pharmaceutical, nutraceutical, and specialty chemical manufacturing. The global barbituric acid market exhibits characteristics typical of specialty chemical intermediates, including concentrated production bases, specialized applications, and close relationships between suppliers and end-users. The market demonstrates steady demand growth driven by expanding pharmaceutical and vitamin manufacturing activities worldwide. The barbituric acid market is estimated to range between 30-60 million USD in 2025, representing a niche but stable segment within the broader pharmaceutical intermediates sector. The industry is projected to achieve a compound annual growth rate (CAGR) of 2.8%-4.8% through 2030, reflecting consistent demand from established application segments and emerging therapeutic areas.

Regional Market Dynamics

Asia-Pacific dominates barbituric acid production and consumption, with China serving as the primary manufacturing hub due to established chemical industry infrastructure and competitive production costs. The region benefits from proximity to major vitamin manufacturers and pharmaceutical companies, creating integrated supply chain advantages. India demonstrates growing importance as both a production center and consumption market, driven by expanding generic pharmaceutical manufacturing and

increasing

North America and Europe represent significant consumption markets, particularly for high-purity grades used in pharmaceutical applications. These regions emphasize quality standards and regulatory compliance, supporting premium pricing for certified products.

vitamin production capacity. The country's growth rate in barbituric acid consumption is estimated at 4.0%-5.5% annually, reflecting robust pharmaceutical sector expansion.

European markets show steady demand growth at 2.5%-3.5% annually, supported by established pharmaceutical industries and stringent quality requirements that favor reliable suppliers with comprehensive documentation and certification capabilities.

Application Segments and Growth Trends

Vitamin synthesis represents the largest application segment for barbituric acid, with particular emphasis on Vitamin B2 (riboflavin) and Vitamin B12 (cobalamin) production. This segment demonstrates strong growth at 3.5%-4.8% annually, driven by expanding global vitamin market demand and increasing nutritional supplement consumption.

The vitamin application benefits from growing health consciousness, aging populations, and expanding fortified food markets. Barbituric acid serves as a key starting material in complex synthetic pathways, requiring high purity and consistent quality to ensure final product efficacy.

Pigment manufacturing represents a specialized but significant application area, with barbituric acid used in synthesizing Pigment Yellow 139 and Pigment Orange 64. This segment shows moderate growth at 2.5%-3.8% annually, supported by steady demand from coating, plastic, and printing ink industries.

Pharmaceutical drug synthesis, particularly barbiturate medications, maintains steady demand despite declining use of traditional barbiturate drugs. Growth rates in this segment range from 2.0%-3.2% annually, reflecting specialized therapeutic applications and research requirements.

Key Market Players and Production Capacity

The barbituric acid market is characterized by a concentrated supplier base, with four major Chinese manufacturers dominating global production capacity.

Anshan Hifichem Co. Ltd. operates the largest production facility with 4,000 tons annual capacity, positioning the company as a leading supplier to vitamin and pharmaceutical manufacturers. The company emphasizes quality control and regulatory compliance to serve international markets.

Shijiazhuang Jackchem Co. Ltd. maintains 3,000 tons annual capacity, focusing on high-purity grades for pharmaceutical applications. The company has established strong relationships with major vitamin manufacturers and maintains comprehensive quality assurance systems.

Zhengzhou Lifeng Chemical Co. Ltd. operates 2,000 tons annual capacity, specializing in both pharmaceutical and pigment applications. The company's diversified approach provides market stability and risk mitigation across different end-use sectors.

Ronak Chemicals, with 1,200 tons annual capacity, serves specialized markets and maintains flexibility in product specifications. The company focuses on customer service and technical support to differentiate its offerings in the competitive marketplace.

Porter Five Forces Analysis

Supplier Power: High, due to the concentrated nature of raw material suppliers and specialized production requirements. Key intermediates for barbituric acid synthesis are available from limited sources, creating supplier leverage over pricing and terms.

Buyer Power: Moderate to high, as major vitamin and pharmaceutical manufacturers represent large-volume customers with significant negotiating power. However, switching costs and quality requirements limit buyer flexibility.

Competitive Rivalry: Moderate intensity, with established players competing primarily on quality, reliability, and price. The concentrated supplier base and

specialized applications limit intense price competition while emphasizing service differentiation.

Threat of Substitutes: Low to moderate, as barbituric acid's unique chemical properties make it difficult to substitute in key applications. Alternative synthetic pathways exist for some applications but often prove less economical or efficient.

Barriers to Entry: High, requiring substantial technical expertise, regulatory approvals, and capital investment for production facilities. Quality certification requirements and established customer relationships create significant hurdles for new market entrants.

Market Opportunities and Challenges

Opportunities:

The expanding global vitamin market, driven by increasing health awareness and aging populations, creates substantial growth opportunities for barbituric acid suppliers. Rising demand for dietary supplements and fortified foods supports consistent vitamin production growth.

Pharmaceutical industry evolution, including generic drug development and novel therapeutic compounds, presents opportunities for specialized barbituric acid applications. Research into new barbiturate derivatives for specific medical conditions may create additional demand segments.

Emerging markets in Asia, Africa, and Latin America show increasing pharmaceutical manufacturing activities, creating new customer bases and regional demand centers. Government initiatives supporting local pharmaceutical production enhance market expansion potential.

Challenges:

Regulatory complexity in pharmaceutical and food applications requires substantial compliance investments and ongoing monitoring of changing requirements across

different jurisdictions. Quality standards continue to increase, demanding enhanced production capabilities and testing procedures.

Environmental regulations affecting chemical manufacturing create operational challenges and potential cost increases. Waste treatment and emissions control requirements necessitate ongoing facility upgrades and process improvements.

Raw material availability and pricing volatility impact production costs and margin stability. Supply chain disruptions can significantly affect production schedules and customer relationships, requiring robust contingency planning and supplier diversification strategies.

Market concentration among both suppliers and customers creates risks from consolidation activities and changes in customer preferences or requirements. Maintaining technological competitiveness requires ongoing research and development investments despite the market's niche nature.

Contents

CHAPTER 1 EXECUTIVE SUMMARY

CHAPTER 2 ABBREVIATION AND ACRONYMS

CHAPTER 3 PREFACE

- 3.1 Research Scope
- 3.2 Research Sources
 - 3.2.1 Data Sources
 - 3.2.2 Assumptions
- 3.3 Research Method

CHAPTER 4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

CHAPTER 5 MARKET TREND ANALYSIS

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

CHAPTER 6 INDUSTRY CHAIN ANALYSIS

- 6.1 Upstream/Suppliers Analysis
- 6.2 Barbituric Acid Analysis
 - 6.2.1 Technology Analysis
 - 6.2.2 Cost Analysis
 - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

CHAPTER 7 LATEST MARKET DYNAMICS

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

CHAPTER 8 TRADING ANALYSIS

- 8.1 Export of Barbituric Acid by Region
- 8.2 Import of Barbituric Acid by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST BARBITURIC ACID MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Barbituric Acid Market Size
- 9.2 Barbituric Acid Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
 - 9.5.1 United States
 - 9.5.2 Canada
 - 9.5.3 Mexico

CHAPTER 10 HISTORICAL AND FORECAST BARBITURIC ACID MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Barbituric Acid Market Size
- 10.2 Barbituric Acid Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
 - 10.5.1 Brazil
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

CHAPTER 11 HISTORICAL AND FORECAST BARBITURIC ACID MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Barbituric Acid Market Size
- 11.2 Barbituric Acid Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
 - 11.5.1 China
 - 11.5.2 India
 - 11.5.3 Japan
 - 11.5.4 South Korea
 - 11.5.5 Southeast Asia
 - 11.5.6 Australia

CHAPTER 12 HISTORICAL AND FORECAST BARBITURIC ACID MARKET IN EUROPE (2020-2030)

- 12.1 Barbituric Acid Market Size
- 12.2 Barbituric Acid Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
 - 12.5.1 Germany
 - 12.5.2 France
 - 12.5.3 United Kingdom
 - 12.5.4 Italy
 - 12.5.5 Spain
 - 12.5.6 Belgium
 - 12.5.7 Netherlands
 - 12.5.8 Austria
 - 12.5.9 Poland
 - 12.5.10 Russia

CHAPTER 13 HISTORICAL AND FORECAST BARBITURIC ACID MARKET IN MEA (2020-2030)

- 13.1 Barbituric Acid Market Size
- 13.2 Barbituric Acid Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL BARBITURIC ACID MARKET (2020-2025)

- 14.1 Barbituric Acid Market Size
- 14.2 Barbituric Acid Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

CHAPTER 15 GLOBAL BARBITURIC ACID MARKET FORECAST (2025-2030)

- 15.1 Barbituric Acid Market Size Forecast
- 15.2 Barbituric Acid Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Ronak Chemicals
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Barbituric acid Information
 - 16.1.3 SWOT Analysis of Ronak Chemicals
 - 16.1.4 Ronak Chemicals Barbituric acid Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Shijiazhuang Jackchem Co. Ltd.
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Barbituric acid Information
 - 16.2.3 SWOT Analysis of Shijiazhuang Jackchem Co. Ltd.
 - 16.2.4 Shijiazhuang Jackchem Co. Ltd. Barbituric acid Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Zhengzhou Lifeng Chemical Co. Ltd.
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Barbituric acid Information
 - 16.3.3 SWOT Analysis of Zhengzhou Lifeng Chemical Co. Ltd.
 - 16.3.4 Zhengzhou Lifeng Chemical Co. Ltd. Barbituric acid Sales, Revenue, Price and

Gross Margin (2020-2025)

16.4 Anshan Hifichem Co. Ltd.

16.4.1 Company Profile

16.4.2 Main Business and Barbituric acid Information

16.4.3 SWOT Analysis of Anshan Hifichem Co. Ltd.

16.4.4 Anshan Hifichem Co. Ltd. Barbituric acid Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms List

Table Research Scope of Barbituric Acid Report

Table Data Sources of Barbituric Acid Report

Table Major Assumptions of Barbituric Acid Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Barbituric Acid Picture

Table Barbituric Acid Classification

Table Barbituric Acid Applications List

Table Drivers of Barbituric Acid Market

Table Restraints of Barbituric Acid Market

Table Opportunities of Barbituric Acid Market

Table Threats of Barbituric Acid Market

Table Raw Materials Suppliers List

Table Different Production Methods of Barbituric Acid

Table Cost Structure Analysis of Barbituric Acid

Table Key End Users List

Table Latest News of Barbituric Acid Market

Table Merger and Acquisition List

Table Planned/Future Project of Barbituric Acid Market

Table Policy of Barbituric Acid Market

Table 2020-2030 Regional Export of Barbituric Acid

Table 2020-2030 Regional Import of Barbituric Acid

Table 2020-2030 Regional Trade Balance

Figure 2020-2030 Regional Trade Balance

Table 2020-2030 North America Barbituric Acid Market Size and Market Volume List

Figure 2020-2030 North America Barbituric Acid Market Size and CAGR

Figure 2020-2030 North America Barbituric Acid Market Volume and CAGR

Table 2020-2030 North America Barbituric Acid Demand List by Application

Table 2020-2025 North America Barbituric Acid Key Players Sales List

Table 2020-2025 North America Barbituric Acid Key Players Market Share List
Table 2020-2030 North America Barbituric Acid Demand List by Type
Table 2020-2025 North America Barbituric Acid Price List by Type
Table 2020-2030 United States Barbituric Acid Market Size and Market Volume List
Table 2020-2030 United States Barbituric Acid Import & Export List
Table 2020-2030 Canada Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Canada Barbituric Acid Import & Export List
Table 2020-2030 Mexico Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Mexico Barbituric Acid Import & Export List
Table 2020-2030 South America Barbituric Acid Market Size and Market Volume List
Figure 2020-2030 South America Barbituric Acid Market Size and CAGR
Figure 2020-2030 South America Barbituric Acid Market Volume and CAGR
Table 2020-2030 South America Barbituric Acid Demand List by Application
Table 2020-2025 South America Barbituric Acid Key Players Sales List
Table 2020-2025 South America Barbituric Acid Key Players Market Share List
Table 2020-2030 South America Barbituric Acid Demand List by Type
Table 2020-2025 South America Barbituric Acid Price List by Type
Table 2020-2030 Brazil Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Brazil Barbituric Acid Import & Export List
Table 2020-2030 Argentina Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Argentina Barbituric Acid Import & Export List
Table 2020-2030 Chile Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Chile Barbituric Acid Import & Export List
Table 2020-2030 Peru Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Peru Barbituric Acid Import & Export List
Table 2020-2030 Asia & Pacific Barbituric Acid Market Size and Market Volume List
Figure 2020-2030 Asia & Pacific Barbituric Acid Market Size and CAGR
Figure 2020-2030 Asia & Pacific Barbituric Acid Market Volume and CAGR
Table 2020-2030 Asia & Pacific Barbituric Acid Demand List by Application
Table 2020-2025 Asia & Pacific Barbituric Acid Key Players Sales List
Table 2020-2025 Asia & Pacific Barbituric Acid Key Players Market Share List
Table 2020-2030 Asia & Pacific Barbituric Acid Demand List by Type
Table 2020-2025 Asia & Pacific Barbituric Acid Price List by Type
Table 2020-2030 China Barbituric Acid Market Size and Market Volume List
Table 2020-2030 China Barbituric Acid Import & Export List
Table 2020-2030 India Barbituric Acid Market Size and Market Volume List
Table 2020-2030 India Barbituric Acid Import & Export List
Table 2020-2030 Japan Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Japan Barbituric Acid Import & Export List

Table 2020-2030 South Korea Barbituric Acid Market Size and Market Volume List
Table 2020-2030 South Korea Barbituric Acid Import & Export List
Table 2020-2030 Southeast Asia Barbituric Acid Market Size List
Table 2020-2030 Southeast Asia Barbituric Acid Market Volume List
Table 2020-2030 Southeast Asia Barbituric Acid Import List
Table 2020-2030 Southeast Asia Barbituric Acid Export List
Table 2020-2030 Australia Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Australia Barbituric Acid Import & Export List
Table 2020-2030 Europe Barbituric Acid Market Size and Market Volume List
Figure 2020-2030 Europe Barbituric Acid Market Size and CAGR
Figure 2020-2030 Europe Barbituric Acid Market Volume and CAGR
Table 2020-2030 Europe Barbituric Acid Demand List by Application
Table 2020-2025 Europe Barbituric Acid Key Players Sales List
Table 2020-2025 Europe Barbituric Acid Key Players Market Share List
Table 2020-2030 Europe Barbituric Acid Demand List by Type
Table 2020-2025 Europe Barbituric Acid Price List by Type
Table 2020-2030 Germany Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Germany Barbituric Acid Import & Export List
Table 2020-2030 France Barbituric Acid Market Size and Market Volume List
Table 2020-2030 France Barbituric Acid Import & Export List
Table 2020-2030 United Kingdom Barbituric Acid Market Size and Market Volume List
Table 2020-2030 United Kingdom Barbituric Acid Import & Export List
Table 2020-2030 Italy Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Italy Barbituric Acid Import & Export List
Table 2020-2030 Spain Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Spain Barbituric Acid Import & Export List
Table 2020-2030 Belgium Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Belgium Barbituric Acid Import & Export List
Table 2020-2030 Netherlands Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Netherlands Barbituric Acid Import & Export List
Table 2020-2030 Austria Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Austria Barbituric Acid Import & Export List
Table 2020-2030 Poland Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Poland Barbituric Acid Import & Export List
Table 2020-2030 Russia Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Russia Barbituric Acid Import & Export List
Table 2020-2030 MEA Barbituric Acid Market Size and Market Volume List
Figure 2020-2030 MEA Barbituric Acid Market Size and CAGR
Figure 2020-2030 MEA Barbituric Acid Market Volume and CAGR

Table 2020-2030 MEA Barbituric Acid Demand List by Application
Table 2020-2025 MEA Barbituric Acid Key Players Sales List
Table 2020-2025 MEA Barbituric Acid Key Players Market Share List
Table 2020-2030 MEA Barbituric Acid Demand List by Type
Table 2020-2025 MEA Barbituric Acid Price List by Type
Table 2020-2030 Egypt Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Egypt Barbituric Acid Import & Export List
Table 2020-2030 Israel Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Israel Barbituric Acid Import & Export List
Table 2020-2030 South Africa Barbituric Acid Market Size and Market Volume List
Table 2020-2030 South Africa Barbituric Acid Import & Export List
Table 2020-2030 Gulf Cooperation Council Countries Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Gulf Cooperation Council Countries Barbituric Acid Import & Export List
Table 2020-2030 Turkey Barbituric Acid Market Size and Market Volume List
Table 2020-2030 Turkey Barbituric Acid Import & Export List
Table 2020-2025 Global Barbituric Acid Market Size List by Region
Table 2020-2025 Global Barbituric Acid Market Size Share List by Region
Table 2020-2025 Global Barbituric Acid Market Volume List by Region
Table 2020-2025 Global Barbituric Acid Market Volume Share List by Region
Table 2020-2025 Global Barbituric Acid Demand List by Application
Table 2020-2025 Global Barbituric Acid Demand Market Share List by Application
Table 2020-2025 Global Barbituric Acid Capacity List
Table 2020-2025 Global Barbituric Acid Key Vendors Capacity Share List
Table 2020-2025 Global Barbituric Acid Key Vendors Production List
Table 2020-2025 Global Barbituric Acid Key Vendors Production Share List
Figure 2020-2025 Global Barbituric Acid Capacity Production and Growth Rate
Table 2020-2025 Global Barbituric Acid Key Vendors Production Value List
Figure 2020-2025 Global Barbituric Acid Production Value and Growth Rate
Table 2020-2025 Global Barbituric Acid Key Vendors Production Value Share List
Table 2020-2025 Global Barbituric Acid Demand List by Type
Table 2020-2025 Global Barbituric Acid Demand Market Share List by Type
Table 2020-2025 Regional Barbituric Acid Price List
Table 2025-2030 Global Barbituric Acid Market Size List by Region
Table 2025-2030 Global Barbituric Acid Market Size Share List by Region
Table 2025-2030 Global Barbituric Acid Market Volume List by Region
Table 2025-2030 Global Barbituric Acid Market Volume Share List by Region
Table 2025-2030 Global Barbituric Acid Demand List by Application

Table 2025-2030 Global Barbituric Acid Demand Market Share List by Application

Table 2025-2030 Global Barbituric Acid Capacity List

Table 2025-2030 Global Barbituric Acid Key Vendors Capacity Share List

Table 2025-2030 Global Barbituric Acid Key Vendors Production List

Table 2025-2030 Global Barbituric Acid Key Vendors Production Share List

Figure 2025-2030 Global Barbituric Acid Capacity Production and Growth Rate

Table 2025-2030 Global Barbituric Acid Key Vendors Production Value List

Figure 2025-2030 Global Barbituric Acid Production Value and Growth Rate

Table 2025-2030 Global Barbituric Acid Key Vendors Production Value Share List

Table 2025-2030 Global Barbituric Acid Demand List by Type

Table 2025-2030 Global Barbituric Acid Demand Market Share List by Type

Table 2025-2030 Barbituric Acid Regional Price List

Table Ronak Chemicals Information

Table SWOT Analysis of Ronak Chemicals

Table 2020-2025 Ronak Chemicals Barbituric acid Product Capacity Production Price Cost Production Value

Figure 2020-2025 Ronak Chemicals Barbituric acid Capacity Production and Growth Rate

Figure 2020-2025 Ronak Chemicals Barbituric acid Market Share

Table Shijiazhuang Jackchem Co. Ltd. Information

Table SWOT Analysis of Shijiazhuang Jackchem Co. Ltd.

Table 2020-2025 Shijiazhuang Jackchem Co. Ltd. Barbituric acid Product Capacity Production Price Cost Production Value

Figure 2020-2025 Shijiazhuang Jackchem Co. Ltd. Barbituric acid Capacity Production and Growth Rate

Figure 2020-2025 Shijiazhuang Jackchem Co. Ltd. Barbituric acid Market Share

Table Zhengzhou Lifeng Chemical Co. Ltd. Information

Table SWOT Analysis of Zhengzhou Lifeng Chemical Co. Ltd.

Table 2020-2025 Zhengzhou Lifeng Chemical Co. Ltd. Barbituric acid Product Capacity Production Price Cost Production Value

Figure 2020-2025 Zhengzhou Lifeng Chemical Co. Ltd. Barbituric acid Capacity Production and Growth Rate

Figure 2020-2025 Zhengzhou Lifeng Chemical Co. Ltd. Barbituric acid Market Share

Table Anshan Hifichem Co. Ltd. Information

Table SWOT Analysis of Anshan Hifichem Co. Ltd.

Table 2020-2025 Anshan Hifichem Co. Ltd. Barbituric acid Product Capacity Production Price Cost Production Value

Figure 2020-2025 Anshan Hifichem Co. Ltd. Barbituric acid Capacity Production and Growth Rate

Figure 2020-2025 Anshan Hifichem Co. Ltd. Barbituric acid Market Share

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