

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

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Abstracts

Dicyandiamide Market Summary

Introduction

Dicyandiamide (DCD) is a chemical compound used as a curing agent for epoxy resins, an additive in starch pastes, a stabilizer in synthetic detergents, a raw material for dyestuffs, and other applications. The dicyandiamide industry is characterized by its critical role in high-performance coatings, adhesives, and textiles, driven by demand for durable and eco-friendly materials. Key trends include the development of low-VOC curing agents, high-purity grades for electronics, and sustainable production processes. The market is propelled by growth in epoxy resin applications, textile manufacturing, and detergent production, particularly in Asia Pacific.

Market Size and Growth Forecast

The global Dicyandiamide market was valued at USD 360–620 million in 2024, with an estimated CAGR of 5.5%–7.5% from 2025 to 2030, driven by demand in epoxy resins and textiles.

Regional Analysis

North America is projected to grow at a CAGR of 5.3%–7.3%, with the U.S. leading due to its coatings and adhesive sectors, focusing on high-performance DCD.

Europe is expected to achieve a CAGR of 5.0%–7.0%, with Germany driving demand

through its emphasis on eco-friendly materials.

Asia Pacific is anticipated to record the highest growth at 6.0%–8.0%, led by China, where textile and epoxy resin applications fuel DCD demand.

Rest of the World, particularly Brazil, is expected to grow at 4.8%–6.8%, with trends toward industrial applications.

Application Analysis

Epoxy resin curing agent applications are estimated to grow at a CAGR of 5.8%–7.8%, driven by DCD's use in coatings and adhesives, with trends toward low-VOC formulations.

Starch paste additive applications are projected to expand at 5.5%–7.5%, supported by textile manufacturing, with innovations in high-efficiency additives.

Synthetic detergent stabilizer applications are expected to grow at 5.3%–7.3%, focusing on eco-friendly detergents, with trends toward high-purity DCD.

Dyestuff applications are anticipated to grow at 5.0%–7.0%, driven by textile dyes, with advancements in chemical synthesis.

Other applications, including pharmaceuticals, are projected to grow at 4.8%–6.8%, with trends toward specialized uses.

Key Market Players

Alzchem Group, headquartered in Trostberg, Germany, produces DCD for epoxy resins, known for its sustainable chemical solutions.

Nippon Carbide Industries, based in Tokyo, Japan, offers DCD for textiles and coatings, focusing on scalable production.

Ningxia Jiafeng Chemicals, headquartered in Ningxia, China, provides DCD for industrial applications, emphasizing cost-competitive manufacturing.

Belite Chemical, based in Ningxia, China, produces DCD for detergents and dyes, known for its innovative formulations.

Ningxia Dadi Circular Development, headquartered in Ningxia, China, offers DCD for epoxy resins, focusing on sustainable production.

Ningxia Taikang Pharmaceutical, based in Ningxia, China, provides DCD for industrial uses, emphasizing high-capacity production.

Porter's Five Forces Analysis

The threat of new entrants is moderate; moderate capital costs attract niche players, but regional dominance creates barriers.

The threat of substitutes is moderate; alternative curing agents compete, but DCD's versatility maintains its edge.

Buyer power is moderate; large coating and textile firms negotiate pricing, but DCD's specialized role limits leverage.

Supplier power is low; raw materials are widely available, reducing supplier influence.

Competitive rivalry is high; players differentiate through high-purity and eco-friendly formulations.

Market Opportunities and Challenges

Opportunities

Growth in epoxy resin applications drives DCD demand.

Expansion of textile manufacturing enhances market opportunities.

Emerging markets in Asia Pacific offer growth potential due to industrial growth.

Challenges

Regulatory scrutiny on chemical production increases compliance costs.

Fluctuating raw material prices impact production costs.

Competition from alternative chemicals challenges market share.

Growth Trend Analysis

The Dicyandiamide market is growing steadily, driven by demand in epoxy resins and textiles. Ningxia, known as the “world capital of cyanamide industries,” produces over 90% of global DCD, with a capacity of 274,000 tons annually, accounting for 82% of global supply. Belite Chemical has a DCD capacity of 15,000 tons, Ningxia Dadi Circular Development has 33,000 tons, and Ningxia Jiafeng Chemicals has 35,000 tons. In 2023, Ningxia Taikang Pharmaceutical launched a 60,000-ton DCD production line. These developments align with a projected CAGR of 5.5%–7.5% through 2030, reflecting DCD’s role in industrial applications.

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