

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

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Abstracts

Hexamethylenediamine Market Summary

Introduction

Hexamethylenediamine (HMDA) is a key chemical intermediate used primarily in the production of nylon, isocyanates, specialty adhesives, and other applications, valued for its reactivity and ability to form high-strength polymers. The industry is characterized by its focus on high-performance materials, driven by demand for nylon 66 in automotive, textiles, and industrial sectors. Key trends include bio-based HMDA, sustainable production

processes, and advanced polymerization techniques. The market is propelled by the growth of nylon-based products, increasing demand for durable adhesives, and advancements in chemical manufacturing.

Market Size and Growth Forecast

The global Hexamethylenediamine market was valued at USD 5.1–7.9 billion in 2024, with an estimated CAGR of 5.8%–7.8% from 2025 to 2030, driven by demand for nylon and specialty chemicals.

Regional Analysis

North America is projected to grow at a CAGR of 5.5%–7.5%, with the U.S. leading due to its nylon and adhesive sectors, focusing on sustainable HMDA production.

Europe is expected to achieve a CAGR of 5.3%–7.3%, with Germany driving demand, emphasizing eco-friendly intermediates for nylon applications.

Asia Pacific is anticipated to record the highest growth at 6.2%–8.2%, driven by China and Japan, where nylon and adhesive industries fuel HMDA demand, with trends toward cost-effective production.

Rest of the World, particularly Brazil, is expected to grow at 5.0%–7.0%, with trends toward industrial adhesive applications.

Application Analysis

Nylon applications are estimated to grow at a CAGR of 6.0%–8.0%, driven by HMDA's use in nylon 66 production, with trends favoring high-strength polymers.

Isocyanates applications are projected to expand at 5.8%–7.8%, supported by HMDA's use in polyurethane coatings, with innovations in low-VOC formulations.

Specialty adhesives applications are expected to grow at 5.5%–7.5%, as HMDA enhances bonding strength, with trends toward eco-friendly adhesives.

Other applications, including coatings and resins, are anticipated to grow at 5.2%–7.2%, focusing on durable and sustainable properties.

Key Market Players

INVISTA, based in Wichita, Kansas, USA, is a leader in HMDA production, offering solutions for nylon and adhesives, known for its innovative and sustainable technologies.

Ascend Performance Materials, headquartered in Houston, Texas, USA, specializes in HMDA for nylon 66, emphasizing bio-based and scalable production.

BASF, based in Ludwigshafen, Germany, produces HMDA for isocyanates and adhesives, renowned for its advanced chemical technologies.

DOMO Chemicals, based in Ghent, Belgium, offers HMDA for nylon applications, focusing on high-quality and eco-friendly solutions.

ASAHI KASEI, based in Tokyo, Japan, provides HMDA for nylon and specialty adhesives, emphasizing durability and innovation.

Toray Industries, headquartered in Tokyo, Japan, produces HMDA for nylon-based textiles, known for its advanced material technologies.

Solvay, based in Brussels, Belgium, offers HMDA for isocyanates and coatings, focusing on sustainable manufacturing.

Shenma, based in Pingdingshan, China, produces HMDA for nylon applications, emphasizing cost-competitive solutions.

Tianchen Qixiang New Material Limited, based in Zibo, China, provides HMDA for nylon production, known for its large-scale production capabilities.

Huafeng, based in China, offers HMDA for adhesives and coatings, focusing on innovative and scalable solutions.

Porter's Five Forces Analysis

The threat of new entrants is moderate; high capital costs and technical expertise required for HMDA production create barriers, though demand attracts niche players.

The threat of substitutes is low; alternative diamines are less effective for nylon 66 production, maintaining HMDA's edge.

Buyer power is moderate; large nylon manufacturers negotiate pricing, but HMDA's critical role limits buyer leverage.

Supplier power is moderate; raw materials like adiponitrile face supply constraints, increasing supplier influence.

Competitive rivalry is high; key players differentiate through sustainable production and application-specific innovations.

Market Opportunities and Challenges

Opportunities

Rising demand for nylon 66 drives HMDA adoption in automotive and textile sectors.

Advancements in bio-based HMDA enhance market growth.

Emerging markets in Asia Pacific offer expansion opportunities due to industrial growth.

Challenges

Supply chain constraints for raw materials increase production costs.

Regulatory scrutiny on chemical intermediates increases compliance costs.

High production costs limit HMDA adoption in cost-sensitive applications.

Growth Trend Analysis

The Hexamethylenediamine market is growing steadily, driven by demand for nylon and specialty chemicals. On August 5, 2024, INVISTA announced the reopening of its nylon intermediate plant and is constructing a 120,000-ton HMDA project in Shanghai. Tianchen Qixiang New Material Limited is building a 300,000-ton HMDA project to support nylon production. These developments align with a projected CAGR of 5.8%–7.8% through 2030, reflecting HMDA's critical role in high-performance polymer production.

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