

# **Iminodiacetonitrile Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application**

<https://marketpublishers.com/r/I0CAF97B2904EN.html>

Date: May 2025

Pages: 77

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

ID: I0CAF97B2904EN

## **Abstracts**

### **Iminodiacetonitrile Market Summary**

#### **Introduction**

Iminodiacetonitrile is an organic compound primarily used as an intermediate in producing Glyphosate, a widely used herbicide. It is a key component in the Iminodiacetonitrile route, where it is hydrolyzed to iminodiacetic acid and then reacted with formaldehyde and phosphorous acid to form N-(Phosphonomethyl)iminodiacetic acid (PMG), a Glyphosate precursor. The industry operates within the specialty chemicals sector, emphasizing precise synthesis, high purity, and agricultural applications. The market is driven by Glyphosate demand, with China as the leading producer of both PMG and Glyphosate. Challenges include environmental regulations, competition from alternative production routes like the Glycine and IDA methods, and raw material price volatility. The global Iminodiacetonitrile market is projected to reach USD 120-250 million by 2030, with a CAGR of 2.0%-4.0%, reflecting steady demand tempered by regulatory and competitive pressures.

#### **Market Size and Growth Forecast**

The Iminodiacetonitrile market is expected to grow to USD 120-250 million by 2030, with a CAGR of 2.0%-4.0%. Growth is anchored in its role as a Glyphosate intermediate, supporting agricultural productivity globally. However, expansion is moderated by regulatory restrictions on herbicides, the rise of sustainable farming practices, and competition from alternative routes like the Glycine method, which is gaining traction for its mature process and broad raw material availability. The forecast

reflects a stable market with incremental growth, balancing agricultural demand with evolving industry dynamics.

## Regional Analysis

The Iminodiacetonitrile market varies by region, driven by production capacity and regulatory frameworks.

**Asia-Pacific:** Growth is estimated at 2.5%-4.5%. China dominates as a producer and consumer, supported by facilities like Guang'an Chengxin Chemical Co. Ltd.'s 25,000-ton plant. Trends focus on cost-effective production to meet Glyphosate demand, with exports to markets like Argentina and India.

**North America:** Growth ranges from 1.5%-3.5%. The United States drives demand for Glyphosate, with trends emphasizing sustainable agriculture and regulatory compliance.

**Europe:** Growth is projected at 1.8%-3.8%. Germany and France are key markets, with trends focusing on eco-friendly herbicides and strict EU standards.

**Rest of the World:** Growth is estimated at 1.0%-3.0%. Latin America and Africa show potential, driven by agricultural needs and localized production.

## Application Analysis

Iminodiacetonitrile's primary application is in Glyphosate production, with minor uses in other areas.

**Glyphosate:** Growth is estimated at 2.0%-4.0%. This segment dominates, driven by herbicide demand in agriculture. Trends include eco-friendly formulations and competition from alternative routes.

**Others:** Growth ranges from 1.0%-3.0%. Niche applications maintain limited growth, tied to specific needs.

Glyphosate leads due to its agricultural significance, with trends shifting toward sustainability.

## Key Market Players

Key players in the Iminodiacetonitrile market include:

**Monsanto:** A global leader in agricultural chemicals, it focuses on Glyphosate production with an emphasis on quality.

**Guang'an Chengxin Chemical Co. Ltd.:** With a 25,000-ton capacity, it targets Glyphosate markets with cost-effective production.

**Sichuan Hebang Biotechnology Co. Ltd.:** Through its subsidiary Guang'an Bimeida, it is building a 300,000-ton Anilinoacetone nitrile plant, set for 2026 completion.

**Sichuan Energy Investment Yongli Chemical Co. Ltd.:** Operating a 26,000-ton facility, it serves regional Glyphosate production.

## Porter's Five Forces Analysis

The market's competitive landscape is shaped by:

**Threat of New Entrants:** Low. High barriers protect established players.

**Bargaining Power of Suppliers:** Moderate. Raw material suppliers like formaldehyde producers hold some influence, offset by sourcing options.

**Bargaining Power of Buyers:** Moderate. Glyphosate producers demand quality but have few suppliers, balancing power.

**Threat of Substitutes:** Moderate. Alternative routes like the Glycine method compete, especially in sustainable markets.

**Industry Rivalry:** Moderate. Competition centers on capacity and innovation, maintaining stability.

## Market Opportunities and Challenges

### Opportunities

Herbicide demand in emerging markets offers growth potential.

Eco-friendly herbicide innovations align with sustainability goals.

Capacity expansions in Asia-Pacific enhance supply chains.

## Challenges

Regulatory restrictions on herbicides limit expansion, notably in Europe.

Competition from alternative Glyphosate routes threatens market share.

Raw material price volatility impacts costs.

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