

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

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Abstracts

Isophthalonitrile Market Summary

Introduction

Isophthalonitrile (IPN), a white crystalline compound, is a key intermediate in agrochemicals and industrial chemicals, notably for producing chlorothalonil (a fungicide) and meta-xylenediamine (MXDA), used in epoxy resins. The market operates within the specialty chemicals sector, driven by agricultural productivity and industrial applications, though it faces challenges from raw material volatility, regulatory scrutiny, and competition from alternative intermediates.

Market Size and Growth Forecast

The global isophthalonitrile market is valued at USD 45–85 million in 2025, with a projected CAGR of 5.5–8.5% through 2030. This strong growth reflects agrochemical demand and industrial expansion.

Regional Analysis

Asia Pacific: Asia Pacific grows at 6–9%. China dominates production and consumption, while India expands with agrochemical needs. Trends focus on cost-effective synthesis.

Europe: With 20–25%, Europe grows at 5–7%. Germany leads with industrial uses. Trends emphasize regulatory compliance.

North America: Accounting for 15–20%, North America grows at 5–7%. The US supports MXDA demand. Trends prioritize quality intermediates.

Rest of the World: Representing 10–15%, it grows at 5.5–8%. Brazil contributes via agriculture, with trends favoring affordability.

Application Analysis

Chlorothalonil: Expected to grow at 6–9%, it dominates as a fungicide intermediate. Trends focus on sustainable agriculture.

Meta-Xylenediamine (MXDA): Projected at 5–7.5%, it serves epoxy resins. Trends highlight industrial durability.

Key Market Players

Mitsubishi Gas Chemical: A Japanese leader, it supplies high-quality isophthalonitrile.

Suli Co. Ltd.: A Chinese firm, it focuses on agrochemical intermediates.

Limin Chemical Co. Ltd.: Specializes in cost-effective IPN for regional markets.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate; technical barriers limit entry, but demand attracts players.

Threat of Substitutes: Medium; alternative fungicides and resins compete, though IPN's specificity sustains demand.

Bargaining Power of Buyers: High; agrochemical firms negotiate due to bulk needs.

Bargaining Power of Suppliers: Medium; raw material dependencies give suppliers leverage.

Competitive Rivalry: Moderate; few players compete on quality and cost.

Market Opportunities and Challenges

Opportunities:

- Growing agrochemical demand in Asia Pacific offers a vibrant opportunity for chlorothalonil production.
- Industrial expansion worldwide creates a promising landscape for MXDA applications.
- Sustainability trends present a pathway, as eco-friendly intermediates gain traction.

Challenges:

- Raw material volatility risks supply stability, requiring flexible sourcing.
- Regulatory restrictions on fungicides demand compliance, increasing costs.
- Competition from substitutes pressures market share, necessitating differentiation.

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