

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

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Abstracts

Isopropyl Chloride (IPC), also known as 2-Chloropropane (CAS No. 75-29-6), is a low-molecular-weight, clear, and volatile alkyl halide. Its market is characterized by its foundational role as a highly reactive, essential chlorination agent and solvent across various specialty chemical synthesis pathways. It is primarily valued for its capacity to introduce the isopropyl group (isopropylation) into complex molecules and its specialized function in high-performance polymer additives.

The Isopropyl Chloride industry is characterized by the following key features:

Foundational Chemical Intermediate: IPC is valued not for its end-use product form, but as a critical intermediate for manufacturing high-value downstream chemicals. Its demand is inextricably linked to the production cycles of specialty reagents and additives, particularly in the life sciences and high-tech material sectors.

Isopropylation Agent: Its core chemical function is to facilitate the isopropylation reaction, a necessity in the synthesis of specific pharmaceutical APIs and agrochemicals, though this is often an indirect or captive use.

Specialty Reagent Manufacturing: A significant and growing market feature is its role in the preparation of specialized, organometallic compounds like Grignard Reagents, which are non-negotiable reagents in fine chemical and pharmaceutical synthesis.

Commodity Cost Link: Production is based on a readily available commodity

chemical, Isopropanol (IPA), meaning the profitability of IPC producers is sensitive to IPA price volatility and energy costs.

The global market for Isopropyl Chloride is estimated to be valued in the range of 25-50 million USD in 2025. Driven by stable, specialized demand from organometallic synthesis and high-performance material additives, the market is projected to achieve a Compound Annual Growth Rate (CAGR) in the range of 2.0%-4.0% through 2030, reflecting steady, sustained industrial and specialty chemical growth.

Applications Driving Isopropyl Chloride Demand

IPC is a versatile compound, crucial for both high-end chemical synthesis and specialized industrial applications.

Grignard Reagents:

Role: IPC is a primary raw material used to prepare Isopropylmagnesium Chloride and other related organometallic reagents.

Application Focus: These Grignard reagents are among the most versatile and essential tools in modern organic synthesis, used extensively in the production of pharmaceutical intermediates, vitamins, and specialized fine chemicals. The high purity of the Grignard reagent, which relies on high-purity IPC, is critical for reaction success.

Trend: Demand is stable and growing, linked to the global expansion of complex API synthesis and the need for precision chemical manufacturing.

Silane Coupling Agents (SCAs):

Role: IPC is a key intermediate in the synthesis of various specialized silane coupling agents.

Application Focus: SCAs are used as adhesion promoters and surface modifiers, bridging organic polymers and inorganic substrates (e.g., fiberglass, fillers). They are vital components in composites, advanced

coatings, adhesives, and sealants used in high-tech manufacturing, automotive, and construction.

Trend: Demand is increasing, driven by the growth of high-performance polymer composites and the need for lighter, stronger materials in electric vehicles (EVs) and advanced infrastructure.

Others (Blowing Agents and Solvents):

Blowing Agents: IPC can be blended with pentane and used as a secondary blowing agent in the production of polyurethane and phenolic foam insulation panels. This application is driven by energy efficiency standards in construction.

Specialty Solvents: It is used as a specialized, reactive solvent in certain niche industrial processes.

Overview of Key Market Players and Capacities

The IPC market is served by specialized chemical manufacturers, with a significant concentration of new, large-scale capacity emerging from APAC.

Shandong Tongcheng Medicine Co. Ltd. (China):

Major Capacity: Reports a very large-scale capacity of 24,000 tons per year (24,000 tpa). This substantial capacity positions the company as one of the most significant producers globally, serving both the vast domestic demand (especially for Grignard reagents and silanes) and export markets.

Anhui Weixiang New Materials Co. Ltd (China):

Significant Capacity: Reports a capacity of 10,000 tons per year (10,000 tpa). The presence of this and other large-scale Chinese producers underscores the country's dominant role in the supply chain for key organohalide intermediates.

Kashima Chemical (Japan/Global):

Established Specialty Player: Kashima Chemical is a respected producer of specialized chemical intermediates, particularly in Japan. Its focus is typically on high-quality, reliable supply, often catering to high-specification Japanese and multinational clients in the electronics, automotive, and specialty chemical sectors where quality assurance is paramount.

Value Chain Analysis

IPC acts as a single-step conversion product from a commodity chemical, adding value through the subsequent complex synthesis steps.

Stage 1: Upstream Raw Material

Isopropanol (IPA): IPA is the primary precursor, a relatively low-cost commodity alcohol. IPC is synthesized by reacting IPA with a chlorinating agent (e.g., Hydrochloric Acid or Phosphorous Trichloride).

Cost Link: The cost stability of IPC is heavily influenced by the global supply and pricing of IPA, which fluctuates with the petrochemical market.

Stage 2: Isopropyl Chloride Synthesis (Chlorination)

Key Process: The process requires specialized reactors to manage corrosive chlorination agents and is typically a one-step conversion. Purification is critical for high-purity uses like Grignard reagent preparation.

Producers: Large-scale manufacturers like Shandong Tongcheng (24,000 tpa) control this stage.

Value Addition: Value is added through the technical efficiency of the conversion and the purification needed to produce the dry, high-purity grade required for downstream synthesis.

Stage 3: Downstream Conversion

Grignard Reagents: IPC reacts with magnesium to form Isopropylmagnesium Chloride.

Silane Coupling Agents: IPC reacts with chlorosilanes to form the functional coupling agents.

Blowing Agents: IPC is blended with pentane for foam applications.

Stage 4: End-Market Consumption

Pharmaceutical/Fine Chemicals: Use of Grignard reagents in API synthesis.

Advanced Materials: Use of SCAs in composites, adhesives, and paints for aerospace, automotive, and construction.

Construction: Use as a blowing agent in high-efficiency insulation panels.

Regional Market Trends

APAC is becoming the dominant supply center, while demand is spread across global high-tech manufacturing hubs.

Asia-Pacific (APAC)

Production and Export Hub: APAC, primarily China, holds the vast majority of global IPC production capacity (e.g., Shandong Tongcheng, 24,000 tpa; Anhui Weixiang, 10,000 tpa). This concentration is driven by competitive production costs and integrated chemical value chains.

Key Country Trends: China's rapid expansion is fueling both the domestic demand for Grignard reagents (to support its large generic API sector) and export volume. Japan (e.g., Kashima Chemical) remains a key hub for high-end, quality-sensitive specialty chemical production.

Estimated CAGR: In the range of 3.0%-5.0% through 2030, supported by the massive growth in API manufacturing and specialty chemical

synthesis in the region.

North America and Europe

High-Value Consumption and Technical Demand: These regions are major consumers of IPC and its downstream products, particularly Grignard reagents and SCAs, for high-specification industries (aerospace, automotive EV components).

Trend: Demand is stable and driven by stringent quality requirements for Grignard reagents and the growth of advanced composite and coating technologies. There is a strong focus on reliable, qualified supply.

Estimated CAGR: In the range of 1.5%-3.5% through 2030, reflecting steady growth in advanced manufacturing and pharmaceutical synthesis.

Latin America (LATAM) and MEA (Middle East & Africa)

Emerging Demand: These regions are seeing increasing industrialization and construction activity.

Trend: Growth is linked to infrastructure projects (driving foam blowing agent use) and the establishment of basic chemical synthesis capabilities, increasing imports of IPC.

Estimated CAGR: In the range of 1.0%-3.0% through 2030.

Opportunities and Challenges

IPC benefits from the stable demand of its high-value downstream products but faces structural risks related to concentration and volatility.

Opportunities

Organometallic Synthesis Growth: The global expansion of complex pharmaceutical and agrochemical API synthesis guarantees sustained, high-specification demand for IPC as the precursor to Isopropylmagnesium Chloride and other essential

Grignard reagents.

Advanced Materials Driver: The shift toward lightweight composites and high-performance adhesives in the automotive (EV), aerospace, and construction sectors creates a strong, structural demand for IPC-derived Silane Coupling Agents.

Energy Efficiency Mandates: Global regulatory pushes for energy-efficient construction (e.g., stricter insulation standards) support the stable demand for IPC as a cost-effective component in polyurethane and phenolic foam blowing agent blends.

High-Volume Cost Competitiveness: Large-scale capacity in China (e.g., Shandong Tongcheng, 24,000 tpa) allows for the supply of IPC at competitive prices, enabling its use in high-volume, cost-sensitive applications like foam blowing agents.

Challenges

Supply Concentration Risk: The overwhelming concentration of capacity in China introduces significant geopolitical and regulatory risk. Disruptions in Chinese production could immediately impact global API synthesis and specialty chemical manufacturing.

Raw Material Price Volatility: The market is exposed to significant price fluctuation in its commodity precursor, Isopropanol (IPA), which directly affects the cost and profitability of IPC manufacturers.

Alternative Isopropylation Agents: In high-value, highly regulated synthesis (like pharmaceuticals), IPC may face substitution pressure from less volatile or less toxic isopropylation agents, although IPC remains the most cost-effective and commonly used for Grignard synthesis.

Handling and Safety: As a volatile alkyl halide, IPC requires specialized storage, handling, and transportation protocols, adding complexity and cost compared to non-halogenated

precursors, particularly impacting smaller users.

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 Isopropyl Chloride 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 Isopropyl Chloride by Region
- 8.2 Import of Isopropyl Chloride by Region
- 8.3 Balance of Trade

CHAPTER 9 HISTORICAL AND FORECAST ISOPROPYL CHLORIDE MARKET IN NORTH AMERICA (2020-2030)

- 9.1 Isopropyl Chloride Market Size
- 9.2 Isopropyl Chloride 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 ISOPROPYL CHLORIDE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Isopropyl Chloride Market Size
- 10.2 Isopropyl Chloride 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

CHAPTER 11 HISTORICAL AND FORECAST ISOPROPYL CHLORIDE MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Isopropyl Chloride Market Size
- 11.2 Isopropyl Chloride 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 & New Zealand

CHAPTER 12 HISTORICAL AND FORECAST ISOPROPYL CHLORIDE MARKET IN EUROPE (2020-2030)

12.1 Isopropyl Chloride Market Size

12.2 Isopropyl Chloride 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 Northern Europe

CHAPTER 13 HISTORICAL AND FORECAST ISOPROPYL CHLORIDE MARKET IN MEA (2020-2030)

13.1 Isopropyl Chloride Market Size

13.2 Isopropyl Chloride Demand by End Use

13.3 Competition by Players/Suppliers

13.4 Type Segmentation and Price

13.5 Key Countries Analysis

CHAPTER 14 SUMMARY FOR GLOBAL ISOPROPYL CHLORIDE MARKET (2020-2025)

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

CHAPTER 15 GLOBAL ISOPROPYL CHLORIDE MARKET FORECAST (2025-2030)

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

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Kashima Chemical
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Isopropyl Chloride Information
 - 16.1.3 SWOT Analysis of Kashima Chemical
 - 16.1.4 Kashima Chemical Isopropyl Chloride Sales, Revenue, Price and Gross Margin (2020-2025)
 - 16.2 Shandong Tongcheng Medicine Co. Ltd.
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Isopropyl Chloride Information
 - 16.2.3 SWOT Analysis of Shandong Tongcheng Medicine Co. Ltd.
 - 16.2.4 Shandong Tongcheng Medicine Co. Ltd. Isopropyl Chloride Sales, Revenue, Price and Gross Margin (2020-2025)
 - 16.3 Anhui Weixiang New Materials Co. Ltd
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Isopropyl Chloride Information
 - 16.3.3 SWOT Analysis of Anhui Weixiang New Materials Co. Ltd
 - 16.3.4 Anhui Weixiang New Materials Co. Ltd Isopropyl Chloride Sales, Revenue, Price and Gross Margin (2020-2025)
- Please ask for sample pages for full companies list

Tables & Figures

TABLES AND FIGURES

Table Abbreviation and Acronyms List
Table Research Scope of Isopropyl Chloride Report
Table Data Sources of Isopropyl Chloride Report
Table Major Assumptions of Isopropyl Chloride Report
Figure Market Size Estimated Method
Figure Major Forecasting Factors
Figure Isopropyl Chloride Picture
Table Isopropyl Chloride Classification
Table Isopropyl Chloride Applications List
Table Drivers of Isopropyl Chloride Market
Table Restraints of Isopropyl Chloride Market
Table Opportunities of Isopropyl Chloride Market
Table Threats of Isopropyl Chloride Market
Table Raw Materials Suppliers List
Table Different Production Methods of Isopropyl Chloride
Table Cost Structure Analysis of Isopropyl Chloride
Table Key End Users List
Table Latest News of Isopropyl Chloride Market
Table Merger and Acquisition List
Table Planned/Future Project of Isopropyl Chloride Market
Table Policy of Isopropyl Chloride Market
Table 2020-2030 Regional Export of Isopropyl Chloride
Table 2020-2030 Regional Import of Isopropyl Chloride
Table 2020-2030 Regional Trade Balance
Figure 2020-2030 Regional Trade Balance
Table 2020-2030 North America Isopropyl Chloride Market Size and Market Volume List
Figure 2020-2030 North America Isopropyl Chloride Market Size and CAGR
Figure 2020-2030 North America Isopropyl Chloride Market Volume and CAGR
Table 2020-2030 North America Isopropyl Chloride Demand List by Application
Table 2020-2025 North America Isopropyl Chloride Key Players Sales List
Table 2020-2025 North America Isopropyl Chloride Key Players Market Share List
Table 2020-2030 North America Isopropyl Chloride Demand List by Type
Table 2020-2025 North America Isopropyl Chloride Price List by Type
Table 2020-2030 United States Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 United States Isopropyl Chloride Import & Export List

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

Table 2020-2030 Southeast Asia Isopropyl Chloride Import List
Table 2020-2030 Southeast Asia Isopropyl Chloride Export List
Table 2020-2030 Australia & New Zealand Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Australia & New Zealand Isopropyl Chloride Import & Export List
Table 2020-2030 Europe Isopropyl Chloride Market Size and Market Volume List
Figure 2020-2030 Europe Isopropyl Chloride Market Size and CAGR
Figure 2020-2030 Europe Isopropyl Chloride Market Volume and CAGR
Table 2020-2030 Europe Isopropyl Chloride Demand List by Application
Table 2020-2025 Europe Isopropyl Chloride Key Players Sales List
Table 2020-2025 Europe Isopropyl Chloride Key Players Market Share List
Table 2020-2030 Europe Isopropyl Chloride Demand List by Type
Table 2020-2025 Europe Isopropyl Chloride Price List by Type
Table 2020-2030 Germany Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Germany Isopropyl Chloride Import & Export List
Table 2020-2030 France Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 France Isopropyl Chloride Import & Export List
Table 2020-2030 United Kingdom Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 United Kingdom Isopropyl Chloride Import & Export List
Table 2020-2030 Italy Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Italy Isopropyl Chloride Import & Export List
Table 2020-2030 Spain Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Spain Isopropyl Chloride Import & Export List
Table 2020-2030 Belgium Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Belgium Isopropyl Chloride Import & Export List
Table 2020-2030 Netherlands Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Netherlands Isopropyl Chloride Import & Export List
Table 2020-2030 Austria Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Austria Isopropyl Chloride Import & Export List
Table 2020-2030 Poland Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Poland Isopropyl Chloride Import & Export List
Table 2020-2030 Northern Europe Isopropyl Chloride Market Size and Market Volume List
Table 2020-2030 Northern Europe Isopropyl Chloride Import & Export List
Table 2020-2030 MEA Isopropyl Chloride Market Size and Market Volume List
Figure 2020-2030 MEA Isopropyl Chloride Market Size and CAGR
Figure 2020-2030 MEA Isopropyl Chloride Market Volume and CAGR
Table 2020-2030 MEA Isopropyl Chloride Demand List by Application

Table 2020-2025 MEA Isopropyl Chloride Key Players Sales List

Table 2020-2025 MEA Isopropyl Chloride Key Players Market Share List

Table 2020-2030 MEA Isopropyl Chloride Demand List by Type

Table 2020-2025 MEA Isopropyl Chloride Price List by Type

Table 2020-2025 Global Isopropyl Chloride Market Size List by Region

Table 2020-2025 Global Isopropyl Chloride Market Size Share List by Region

Table 2020-2025 Global Isopropyl Chloride Market Volume List by Region

Table 2020-2025 Global Isopropyl Chloride Market Volume Share List by Region

Table 2020-2025 Global Isopropyl Chloride Demand List by Application

Table 2020-2025 Global Isopropyl Chloride Demand Market Share List by Application

Table 2020-2025 Global Isopropyl Chloride Capacity List

Table 2020-2025 Global Isopropyl Chloride Key Vendors Capacity Share List

Table 2020-2025 Global Isopropyl Chloride Key Vendors Production List

Table 2020-2025 Global Isopropyl Chloride Key Vendors Production Share List

Figure 2020-2025 Global Isopropyl Chloride Capacity Production and Growth Rate

Table 2020-2025 Global Isopropyl Chloride Key Vendors Production Value List

Figure 2020-2025 Global Isopropyl Chloride Production Value and Growth Rate

Table 2020-2025 Global Isopropyl Chloride Key Vendors Production Value Share List

Table 2020-2025 Global Isopropyl Chloride Demand List by Type

Table 2020-2025 Global Isopropyl Chloride Demand Market Share List by Type

Table 2020-2025 Regional Isopropyl Chloride Price List

Table 2025-2030 Global Isopropyl Chloride Market Size List by Region

Table 2025-2030 Global Isopropyl Chloride Market Size Share List by Region

Table 2025-2030 Global Isopropyl Chloride Market Volume List by Region

Table 2025-2030 Global Isopropyl Chloride Market Volume Share List by Region

Table 2025-2030 Global Isopropyl Chloride Demand List by Application

Table 2025-2030 Global Isopropyl Chloride Demand Market Share List by Application

Table 2025-2030 Global Isopropyl Chloride Capacity List

Table 2025-2030 Global Isopropyl Chloride Key Vendors Capacity Share List

Table 2025-2030 Global Isopropyl Chloride Key Vendors Production List

Table 2025-2030 Global Isopropyl Chloride Key Vendors Production Share List

Figure 2025-2030 Global Isopropyl Chloride Capacity Production and Growth Rate

Table 2025-2030 Global Isopropyl Chloride Key Vendors Production Value List

Figure 2025-2030 Global Isopropyl Chloride Production Value and Growth Rate

Table 2025-2030 Global Isopropyl Chloride Key Vendors Production Value Share List

Table 2025-2030 Global Isopropyl Chloride Demand List by Type

Table 2025-2030 Global Isopropyl Chloride Demand Market Share List by Type

Table 2025-2030 Isopropyl Chloride Regional Price List

Table Kashima Chemical Information

Table SWOT Analysis of Kashima Chemical

Table 2020-2025 Kashima Chemical Isopropyl Chloride Product Capacity Production
Price Cost Production Value

Figure 2020-2025 Kashima Chemical Isopropyl Chloride Capacity Production and
Growth Rate

Figure 2020-2025 Kashima Chemical Isopropyl Chloride Market Share

Table Shandong Tongcheng Medicine Co. Ltd. Information

Table SWOT Analysis of Shandong Tongcheng Medicine Co. Ltd.

Table 2020-2025 Shandong Tongcheng Medicine Co. Ltd. Isopropyl Chloride Product
Capacity Production Price Cost Production Value

Figure 2020-2025 Shandong Tongcheng Medicine Co. Ltd. Isopropyl Chloride Capacity
Production and Growth Rate

Figure 2020-2025 Shandong Tongcheng Medicine Co. Ltd. Isopropyl Chloride Market
Share

Table Anhui Weixiang New Materials Co. Ltd Information

Table SWOT Analysis of Anhui Weixiang New Materials Co. Ltd

Table 2020-2025 Anhui Weixiang New Materials Co. Ltd Isopropyl Chloride Product
Capacity Production Price Cost Production Value

Figure 2020-2025 Anhui Weixiang New Materials Co. Ltd Isopropyl Chloride Capacity
Production and Growth Rate

Figure 2020-2025 Anhui Weixiang New Materials Co. Ltd Isopropyl Chloride Market
Share

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