

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

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Abstracts

Phenylacetonitrile Market Summary

Introduction

Phenylacetonitrile, a colorless to pale yellow liquid, is an organic compound primarily used as a raw material for producing phenylacetic acid, serving as a key intermediate in pharmaceuticals like penicillin, fexofenadine, phenobarbital, primidone, and other specialty chemicals. Known for its nitrile group reactivity, it is a critical building block in organic synthesis, offering versatility in drug and chemical production. The phenylacetonitrile industry is a niche segment of the fine chemicals market, characterized by its upstream role in pharmaceutical supply chains, dependence on downstream demand, and reliance on chemical manufacturing expertise. The market is driven by pharmaceutical advancements, antihistamine production, and industrial synthesis needs, particularly in regions with strong chemical industries, but faces challenges from regulatory restrictions, competition from alternative intermediates, and raw material supply fluctuations.

Market Size and Growth Forecast

The global Phenylacetonitrile market is estimated at approximately USD 150 to 200 million in 2025, with a projected compound annual growth rate (CAGR) of 3.0% to 4.0% from 2025 to 2030, reaching USD 175 to 235 million by 2030. This growth reflects steady demand from pharmaceuticals, supported by healthcare trends, though moderated by regulatory and cost pressures.

Regional Analysis

North America: Holding an estimated 20-25% of the market share, North America grows

at 2.5-3.5%. The United States leads with demand in pharmaceuticals like fexofenadine and phenobarbital, driven by allergy and epilepsy treatments. Trends focus on high-purity intermediates for specialty drugs and regulatory compliance.

Europe: Accounting for 25-30% of the market share, Europe grows at 2-3%. Germany and Switzerland dominate with pharmaceutical synthesis, supported by advanced drug manufacturing. Trends emphasize sustainable intermediates and compliance with EU chemical regulations, though growth is slower due to market saturation.

Asia Pacific: Representing 35-40% of the market share, this region grows at 4-5%.

China leads as a major producer, supplying phenylacetonitrile for phenylacetic acid and penicillin production, while India grows due to pharmaceutical exports. Trends highlight cost-effective production and export strength, with China's scale driving global supply chains.

Rest of the World: With a 10-15% share, this region grows at 3-4%. Brazil and South Africa lead with pharmaceutical demand, fueled by healthcare growth. Trends prioritize affordable intermediates for local drug production.

Application Analysis

Penicillin: Expected to grow at 3-4%, key application. Used via phenylacetic acid, trends focus on antibiotic demand, though moderated by resistance issues.

Fexofenadine: Projected at 3.5-4.5%, growing application. An antihistamine intermediate, trends target allergy treatments, particularly in North America and Europe.

Phenobarbital: Anticipated at 2.5-3.5%, significant application. Used in epilepsy drugs, trends focus on chronic disease management.

Primidone: Expected to grow at 2-3%, niche application. Supports antiepileptic drugs, trends explore specialty pharma.

Others: Projected at 2-3%, covering minor uses. Includes specialty chemicals, trends explore industrial applications.

Key Market Players

HeBei ChengXin: A leading producer of phenylacetonitrile intermediates.

Henan Xinxiang Liutong Industrial Co. Ltd.: Specializes in chemical synthesis.

Atul: Offers high-quality intermediates for pharma.

These companies compete on production efficiency and quality.

Porter's Five Forces Analysis

Threat of New Entrants: Medium; high synthesis expertise and regulatory hurdles deter entry, but demand offers opportunities.

Threat of Substitutes: Medium; alternative intermediates compete, but phenylacetonitrile's role in PAA production sustains demand.

Bargaining Power of Buyers: High; pharma firms negotiate due to bulk orders.

Bargaining Power of Suppliers: Medium; reliance on benzyl inputs gives leverage, offset by sourcing options.

Competitive Rivalry: High; players compete on cost and purity.

Opportunities:

Pharmaceutical growth in Asia Pacific boosts demand for penicillin and antihistamines.

Chronic disease treatments in North America and Europe expand phenobarbital use.

Cost-effective production in China strengthens export markets.

Challenges:

Regulatory restrictions on antibiotics limit penicillin growth.

Raw material volatility affects costs.

Competition from substitutes challenges market share.

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 Phenylacetonitrile 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 Phenylacetonitrile by Region
- 8.2 Import of Phenylacetonitrile by Region
- 8.3 Balance of Trade

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

- 9.1 Phenylacetonitrile Market Size
- 9.2 Phenylacetonitrile 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 PHENYLACETONITRILE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Phenylacetonitrile Market Size
- 10.2 Phenylacetonitrile 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
 - 10.5.2 Argentina
 - 10.5.3 Chile
 - 10.5.4 Peru

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

- 11.1 Phenylacetonitrile Market Size
- 11.2 Phenylacetonitrile 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

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

- 12.1 Phenylacetonitrile Market Size
- 12.2 Phenylacetonitrile 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 Russia

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

- 13.1 Phenylacetonitrile Market Size
- 13.2 Phenylacetonitrile Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

CHAPTER 14 SUMMARY FOR GLOBAL PHENYLACETONITRILE MARKET (2020-2025)

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

CHAPTER 15 GLOBAL PHENYLACETONITRILE MARKET FORECAST (2025-2030)

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

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 HeBei ChengXin
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Phenylacetonitrile Information
 - 16.1.3 SWOT Analysis of HeBei ChengXin
 - 16.1.4 HeBei ChengXin Phenylacetonitrile Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Henan Xinxiang Liutong Industrial Co. Ltd.
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Phenylacetonitrile Information
 - 16.2.3 SWOT Analysis of Henan Xinxiang Liutong Industrial Co. Ltd.
 - 16.2.4 Henan Xinxiang Liutong Industrial Co. Ltd. Phenylacetonitrile Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 Atul
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Phenylacetonitrile Information
 - 16.3.3 SWOT Analysis of Atul

16.3.4 Atul Phenylacetonitrile Sales, Revenue, Price and Gross Margin (2020-2025)

Please ask for sample pages for full companies list

Tables and Figures

Table Abbreviation and Acronyms List

Table Research Scope of Phenylacetonitrile Report

Table Data Sources of Phenylacetonitrile Report

Table Major Assumptions of Phenylacetonitrile Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Phenylacetonitrile Picture

Table Phenylacetonitrile Classification

Table Phenylacetonitrile Applications List

Table Drivers of Phenylacetonitrile Market

Table Restraints of Phenylacetonitrile Market

Table Opportunities of Phenylacetonitrile Market

Table Threats of Phenylacetonitrile Market

Table Raw Materials Suppliers List

Table Different Production Methods of Phenylacetonitrile

Table Cost Structure Analysis of Phenylacetonitrile

Table Key End Users List

Table Latest News of Phenylacetonitrile Market

Table Merger and Acquisition List

Table Planned/Future Project of Phenylacetonitrile Market

Table Policy of Phenylacetonitrile Market

Table 2020-2030 Regional Export of Phenylacetonitrile

Table 2020-2030 Regional Import of Phenylacetonitrile

Table 2020-2030 Regional Trade Balance

Figure 2020-2030 Regional Trade Balance

Table 2020-2030 North America Phenylacetonitrile Market Size and Market Volume List

Figure 2020-2030 North America Phenylacetonitrile Market Size and CAGR

Figure 2020-2030 North America Phenylacetonitrile Market Volume and CAGR

Table 2020-2030 North America Phenylacetonitrile Demand List by Application

Table 2020-2025 North America Phenylacetonitrile Key Players Sales List

Table 2020-2025 North America Phenylacetonitrile Key Players Market Share List

Table 2020-2030 North America Phenylacetonitrile Demand List by Type

Table 2020-2025 North America Phenylacetonitrile Price List by Type

Table 2020-2030 United States Phenylacetonitrile Market Size and Market Volume List

Table 2020-2030 United States Phenylacetonitrile Import & Export List

Table 2020-2030 Canada Phenylacetonitrile Market Size and Market Volume List

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

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

Table 2020-2030 Egypt Phenylacetonitrile Market Size and Market Volume List
Table 2020-2030 Egypt Phenylacetonitrile Import & Export List
Table 2020-2030 Israel Phenylacetonitrile Market Size and Market Volume List
Table 2020-2030 Israel Phenylacetonitrile Import & Export List
Table 2020-2030 South Africa Phenylacetonitrile Market Size and Market Volume List
Table 2020-2030 South Africa Phenylacetonitrile Import & Export List
Table 2020-2030 Gulf Cooperation Council Countries Phenylacetonitrile Market Size and Market Volume List
Table 2020-2030 Gulf Cooperation Council Countries Phenylacetonitrile Import & Export List
Table 2020-2030 Turkey Phenylacetonitrile Market Size and Market Volume List
Table 2020-2030 Turkey Phenylacetonitrile Import & Export List
Table 2020-2025 Global Phenylacetonitrile Market Size List by Region
Table 2020-2025 Global Phenylacetonitrile Market Size Share List by Region
Table 2020-2025 Global Phenylacetonitrile Market Volume List by Region
Table 2020-2025 Global Phenylacetonitrile Market Volume Share List by Region
Table 2020-2025 Global Phenylacetonitrile Demand List by Application
Table 2020-2025 Global Phenylacetonitrile Demand Market Share List by Application
Table 2020-2025 Global Phenylacetonitrile Capacity List
Table 2020-2025 Global Phenylacetonitrile Key Vendors Capacity Share List
Table 2020-2025 Global Phenylacetonitrile Key Vendors Production List
Table 2020-2025 Global Phenylacetonitrile Key Vendors Production Share List
Figure 2020-2025 Global Phenylacetonitrile Capacity Production and Growth Rate
Table 2020-2025 Global Phenylacetonitrile Key Vendors Production Value List
Figure 2020-2025 Global Phenylacetonitrile Production Value and Growth Rate
Table 2020-2025 Global Phenylacetonitrile Key Vendors Production Value Share List
Table 2020-2025 Global Phenylacetonitrile Demand List by Type
Table 2020-2025 Global Phenylacetonitrile Demand Market Share List by Type
Table 2020-2025 Regional Phenylacetonitrile Price List
Table 2025-2030 Global Phenylacetonitrile Market Size List by Region
Table 2025-2030 Global Phenylacetonitrile Market Size Share List by Region
Table 2025-2030 Global Phenylacetonitrile Market Volume List by Region
Table 2025-2030 Global Phenylacetonitrile Market Volume Share List by Region
Table 2025-2030 Global Phenylacetonitrile Demand List by Application
Table 2025-2030 Global Phenylacetonitrile Demand Market Share List by Application
Table 2025-2030 Global Phenylacetonitrile Capacity List
Table 2025-2030 Global Phenylacetonitrile Key Vendors Capacity Share List
Table 2025-2030 Global Phenylacetonitrile Key Vendors Production List
Table 2025-2030 Global Phenylacetonitrile Key Vendors Production Share List

Figure 2025-2030 Global Phenylacetonitrile Capacity Production and Growth Rate
Table 2025-2030 Global Phenylacetonitrile Key Vendors Production Value List
Figure 2025-2030 Global Phenylacetonitrile Production Value and Growth Rate
Table 2025-2030 Global Phenylacetonitrile Key Vendors Production Value Share List
Table 2025-2030 Global Phenylacetonitrile Demand List by Type
Table 2025-2030 Global Phenylacetonitrile Demand Market Share List by Type
Table 2025-2030 Phenylacetonitrile Regional Price List
Table HeBei ChengXin Information
Table SWOT Analysis of HeBei ChengXin
Table 2020-2025 HeBei ChengXin Phenylacetonitrile Product Capacity Production Price
Cost Production Value
Figure 2020-2025 HeBei ChengXin Phenylacetonitrile Capacity Production and Growth
Rate
Figure 2020-2025 HeBei ChengXin Phenylacetonitrile Market Share
Table Henan Xinxiang Liutong Industrial Co. Ltd. Information
Table SWOT Analysis of Henan Xinxiang Liutong Industrial Co. Ltd.
Table 2020-2025 Henan Xinxiang Liutong Industrial Co. Ltd. Phenylacetonitrile Product
Capacity Production Price Cost Production Value
Figure 2020-2025 Henan Xinxiang Liutong Industrial Co. Ltd. Phenylacetonitrile
Capacity Production and Growth Rate
Figure 2020-2025 Henan Xinxiang Liutong Industrial Co. Ltd. Phenylacetonitrile Market
Share
Table Atul Information
Table SWOT Analysis of Atul
Table 2020-2025 Atul Phenylacetonitrile Product Capacity Production Price Cost
Production Value
Figure 2020-2025 Atul Phenylacetonitrile Capacity Production and Growth Rate
Figure 2020-2025 Atul Phenylacetonitrile Market Share

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