

# Phthalic Anhydride Global Market Insights 2026, Analysis and Forecast to 2031

<https://marketpublishers.com/r/P5B095261A9DEN.html>

Date: January 2026

Pages: 157

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

ID: P5B095261A9DEN

## Abstracts

Phthalic Anhydride Market Summary

### 1. Industry Overview and Market Introduction

Phthalic Anhydride (PA), chemically identified by CAS No. 85-44-9, serves as a cornerstone intermediate in the global chemical industry. It acts as the principal commercial form of phthalic acid and is the first anhydride of a dicarboxylic acid to be used commercially. As a white, crystalline solid typically handled in molten form or as flakes, it is essential for the production of a vast array of industrial materials, primarily plasticizers used to make Polyvinyl Chloride (PVC) flexible.

The global Phthalic Anhydride market is currently characterized by a state of maturity, significant installed capacity, and intense regional competition. The industry is navigating a complex landscape defined by shifting feedstock economics, environmental regulations targeting downstream phthalate plasticizers, and the macroeconomic health of the construction and automotive sectors.

Market Size and Growth Forecast

The market valuation reflects its status as a high-volume commodity chemical with saturated demand in developed regions and moderate growth in emerging economies.

Market Scale: By the end of 2026, the global market size for Phthalic Anhydride is estimated to range between 2.5 billion USD and 3.5 billion USD. This valuation takes into account the suppression of prices due to oversupply in key production hubs.

**Growth Trajectory:** The industry is projected to enter a phase of slow, stabilized growth. From 2026 through 2031, the market is anticipated to expand at a Compound Annual Growth Rate (CAGR) of 1.4% to 2.4%. This conservative growth rate attributes to the regulatory headwinds facing phthalate plasticizers and the maturing demand in the construction sector.

**Global Capacity:** The total global production capacity for Phthalic Anhydride stands at approximately 5.5 million tons, signaling a market that is well-supplied, with utilization rates varying significantly by region.

## 2. Production Technologies and Feedstock Analysis

The manufacturing of Phthalic Anhydride is bifurcated into two distinct chemical pathways based on feedstock availability. This dichotomy deeply influences regional cost structures and competitive dynamics.

### The Ortho-Xylene (o-xylene) Oxidation Route

**Process:** This is the dominant production technology globally. It involves the catalytic vapor-phase oxidation of o-xylene (a petrochemical derivative) with air over a fixed-bed reactor containing vanadium-titanium pentoxide catalysts.

**Adoption:** Outside of China, this route is nearly ubiquitous due to the historical availability of crude oil derivatives and higher process yields compared to naphthalene. Major global producers like ExxonMobil, Stepan Company, and UPC Technology Corporation primarily utilize this method.

**Economics:** The profitability of this route is intrinsically linked to global crude oil prices and the spread between mixed xylenes and o-xylene.

### The Naphthalene Oxidation Route

**Process:** This route utilizes industrial naphthalene (derived from coal tar or petroleum) as the feedstock. It also employs a vapor-phase oxidation process similar to the o-xylene route but requires different catalyst formulations and handling protocols due to impurities like sulfur in coal-tar naphthalene.

**Adoption:** This technology has seen a resurgence and widespread adoption primarily in China. The rationale lies in China's massive steel industry, which produces vast

amounts of coal tar as a byproduct of coking. This abundance of coal-based naphthalene offers a cost-competitive alternative to petroleum-based o-xylene.

**Key Players:** While less common globally, specialized companies such as Rain Industries Limited (carbon product specialist) and JFE Chemical Corporation (Japan) maintain significant naphthalene-based capacity. In China, the split between o-xylene and naphthalene capacities is roughly balanced, with o-xylene slightly leading.

### **3. Regional Market Analysis and Supply Dynamics**

The global supply landscape is heavily skewed towards the Asia-Pacific region, which controls the majority of production capacity and dictates global trade flows.

#### **Asia-Pacific (APAC)**

The APAC region is the undisputed global leader in Phthalic Anhydride production and consumption, estimated to hold a 60% to 70% market share.

#### **China:**

**Status:** China is the world's largest producer and consumer, boasting a domestic capacity exceeding 3 million tons.

**Market Dynamics:** The Chinese market is currently facing severe structural challenges. The capacity expansion has outpaced demand, leading to a state of chronic oversupply. This is exacerbated by a weak downstream real estate market (dampening demand for PVC pipes and wires) and strict environmental regulations limiting the use of traditional Phthalic Acid Esters (PAEs) due to reproductive toxicity concerns.

**Production Landscape:** The region hosts a mix of massive integrated complexes and numerous independent producers. Major players include UPC Technology Corporation (with sites in Mainland China), Fujian Fuhua Gulei Chemical Co. Ltd., China Risun Group, Shandong Hongxin Chemical Co. Ltd., and various regional leaders like Tongling Chemical Industry Group and New Solar Technology Group.

#### **India:**

**Status:** India has emerged as a critical growth engine with a capacity of approximately 600,000 tons.

**Key Players:** Thirumalai Chemicals Ltd., IG Petrochemicals (IGPL), and KLJ Group dominate the landscape. Unlike China, Indian demand is growing robustly, supported by infrastructure development and a rising middle class.

#### Taiwan, China & South Korea:

**Status:** Both regions are major net exporters with mature chemical sectors, each possessing capacities exceeding 300,000 tons.

**Key Players:** Nan Ya Plastics Corporation (Taiwan, China), UPC Technology Corporation (Taiwan, China), and Aekyung Chemical (Korea). These producers often focus on high-quality exports and integration with downstream plasticizer units.

**Other APAC:** Significant capacities exist in Japan (JFE Chemical), Malaysia (UPC Technology's subsidiary), Indonesia (PT Petrowidada), and Pakistan (Nimir Chemicals Pakistan Limited).

#### Europe

Europe represents the second-largest region, accounting for approximately 15% to 20% of the global market.

**Market Characteristics:** The market is mature and heavily regulated under REACH, which places strict controls on phthalate plasticizers. This has forced a shift towards non-phthalate alternatives, limiting the growth of PA.

**Key Players:** The supply is consolidated among major chemical entities including Polynt, Deza a.s., Lanxess, Atmosa Petrochemie GmbH, Ostend Basic Chemicals nv, and Ruse Chemicals.

**Production:** European producers mostly rely on the o-xylene route, although Rain Industries utilizes feedstock from its coal tar distillation operations.

## North America

North America is the third-largest region, estimated at 10% to 15% market share.

**Market Characteristics:** The market is highly consolidated and integrated. Producers often consume a significant portion of their PA output internally to produce plasticizers or polyester polyols.

**Key Players:** Stepan Company (a leader in polyester polyols), ExxonMobil (fully integrated from refinery to plasticizer), and Alphagary are the primary manufacturers.

## South America

**Status:** The fourth-largest region, relying on a mix of domestic production and imports to satisfy demand for PVC and paints.

**Key Players:** Elekeiroz (Brazil), Petrom Petroqu?mica Mogi das Cruzes (Brazil), and Varteco Qu?mica Puntana S.A. (Argentina) serve the Mercosur market.

## Middle East and Africa (MEA)

**Status:** The fifth-largest region.

**Key Players:** Petkim Petrokimya (Turkey) and Isegen S.A. (South Africa) are the notable regional suppliers, leveraging proximity to both European and African markets.

## 4. Application Analysis and Segmentation

Phthalic Anhydride is a versatile intermediate, but its fortune is inextricably tied to the plasticizer industry.

### Phthalate Plasticizers (Dominant Application)

**Overview:** The production of phthalate plasticizers is the single largest application for PA, consuming the majority of global output. These plasticizers are additives that impart flexibility and durability to Polyvinyl Chloride (PVC).

**Key Products:**

DEHP/DOP (Di(2-ethylhexyl) phthalate): Historically the volume leader, but now facing severe regulatory restrictions in Europe and North America due to health concerns. It remains widely used in developing regions.

DINP (Diisononyl phthalate): A major alternative to DEHP with a better safety profile, widely used in wires, cables, and flooring.

Others: Includes DIDP (Diisodecyl phthalate) for high-temp cabling, DPHP (Di(2-propylheptyl) phthalate) for automotive applications, DBP (Dibutyl phthalate), and BBP (Butyl benzyl phthalate).

Trends: The segment is under pressure from non-phthalate plasticizers (like DOTP or DINCH), which do not always use Phthalic Anhydride as a raw material, creating a long-term substitution threat.

### Unsaturated Polyester Resins (UPR)

Overview: The second-largest application. PA reacts with glycols and maleic anhydride to form UPR.

Usage: These resins are reinforced with fiberglass to create composites used in boat hulls (marine), construction panels, wind turbine nacelles, and automotive parts. Demand here is cyclical and tied to GDP growth.

### Alkyd Resins

Overview: The third-largest application. PA is reacted with oils and polyols to produce alkyd resins.

Usage: Primary binders in solvent-based architectural paints, industrial coatings, and varnishes. While water-based acrylics are gaining share, PA-based alkyds remain essential for high-gloss and heavy-duty industrial applications.

### Polyester Polyols

Overview: The fourth-largest application sector.

Usage: Aromatic polyester polyols derived from PA are key components in the

production of Polyurethane (PU) foams, particularly rigid foams used for thermal insulation in construction (PIR/PUR boards) and appliances. This segment is growing due to energy efficiency regulations.

#### Niche Applications

**Dyes and Pigments:** PA is a precursor for synthesis of anthraquinone, phthalein, and phthalocyanine dyes (e.g., Phthalocyanine Blue).

**Polyetherimide (PEI) Resin:** High-performance engineering thermoplastics.

**Halogenated Anhydrides:** Flame retardants.

## 5. Competitive Landscape and Key Market Players

The global PA market structure is tiered, ranging from a solitary 'super-producer' to regional champions and numerous smaller Chinese entities.

Tier 1: The Global Leader (>750,000 Tons)

UPC Technology Corporation:

**Status:** The undisputed global leader in Phthalic Anhydride production.

**Footprint:** UPC operates a massive, multi-site production network across Mainland China (Zhuhai, etc.), Taiwan, China, and Malaysia.

**Strategy:** UPC is highly vertically integrated, consuming a large portion of its PA to produce a wide range of plasticizers (DOP, DINP, etc.), thereby capturing value across the chain and insulating itself from merchant market volatility.

Tier 2: Major International Producers (200,000 - 300,000 Tons)

These players have significant regional influence and often export globally.

**Nan Ya Plastics Corporation:** Part of the Formosa Plastics Group, a major player in Taiwan, China with deep downstream integration into PVC processing.

Aekyung Chemical: A dominant force in the South Korean market.

Thirumalai Chemicals Ltd. (TCL): An Indian multinational with efficient production and plans for expansion.

KLJ Group: India's largest plasticizer manufacturer, heavily backward integrated into PA.

Fujian Fuhua Gulei Chemical Co. Ltd.: A major new entrant in China utilizing the o-xylene route in a petrochemical hub.

Tier 3: Key Regional Players (100,000 - 200,000 Tons)

This tier includes established Western multinationals and large Chinese private enterprises.

North America: Stepan Company (focus on polyols), ExxonMobil.

Europe: Lanxess, Ostend Basic Chemicals nv.

China: China Risun Group, Shandong Hongxin Chemical Co. Ltd., Kaifeng JiuHong Chemical Co. Ltd., Tongling Chemical Industry Group, Shanxi Sanqiang New Energy Technology Co. Ltd., Panjin Read Chemical Co. Ltd., Bluesail Group, New Solar Technology Group, Jiangsu Sanmu Group.

Other Notable Players (

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