

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

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Abstracts

Phthalimide Market Summary

The phthalimide market represents a specialized segment within the broader fine chemicals industry, characterized by its critical role as an intermediate in organic synthesis and pharmaceutical manufacturing. Phthalimide (C₈H₅NO₂) is a white crystalline compound derived from phthalic anhydride and ammonia, serving as a versatile building block in various chemical processes. The compound exhibits unique properties that make it indispensable in the production of agrochemicals, dyes, pharmaceuticals, and other specialty chemicals. The global phthalimide market is estimated to be valued between 18-36 million USD in 2025, representing a niche but essential component of the specialty chemicals sector. The market is projected to experience steady compound annual growth rates ranging from 2.4% to 4.8% through 2030, reflecting the stable demand from established applications and gradual expansion in emerging markets.

Application Analysis and Market Segmentation

The phthalimide market segments into several key application areas, each demonstrating distinct growth characteristics and market dynamics.

Agrochemicals Applications

The agrochemicals segment represents the largest application area for phthalimide, accounting for a significant portion of global demand. Phthalimide serves as a critical

intermediate in the synthesis of various pesticides, including the fungicide captan, the insecticide phosmet, and herbicides such as chlorimuron and bentazon. This segment demonstrates growth rates of 2-4% annually, driven by increasing global food production requirements and the continuous development of new crop protection solutions. The segment benefits from the ongoing modernization of agricultural practices in developing countries and the need for more effective pest management solutions.

Dye and Pigment Applications

Phthalimide plays a crucial role in the synthesis of various dyes and pigments, particularly in the production of 4-nitrophthalimide, which serves as an intermediate for fluorescent dyes and azo dyes. This application segment shows moderate growth of 3-5% annually, supported by demand from textile, printing, and coatings industries. The segment faces some challenges from environmental regulations and the shift toward more sustainable dyeing processes, but maintains steady demand from specialty applications requiring high-performance colorants.

Pharmaceutical Applications

The pharmaceutical segment utilizes phthalimide as a protecting group for primary amines and as an intermediate in the synthesis of various pharmaceutical compounds. This application demonstrates growth rates of 2-4% annually, driven by the continuous expansion of the global pharmaceutical industry and the development of new drug compounds. The segment benefits from the increasing complexity of pharmaceutical synthesis and the need for reliable protecting group strategies in multi-step synthetic processes.

Other Applications

Additional applications include the use of phthalimide in the production of various specialty chemicals, polymers, and research chemicals. This segment shows variable growth rates of 1-3% annually, depending on specific end-use developments and market conditions.

Regional Market Distribution and Geographic Trends

The phthalimide market demonstrates distinct regional characteristics influenced by the concentration of pharmaceutical and agrochemical manufacturing activities. Asia-Pacific represents the largest regional market, driven by substantial chemical manufacturing capacity in China, India, and other emerging economies. The region benefits from cost-competitive production capabilities, growing domestic demand for agrochemicals and pharmaceuticals, and established supply chains serving global markets. China dominates regional production and consumption, with significant manufacturing capacity concentrated in chemical industrial parks. The country's position as a major producer of generic pharmaceuticals and agrochemicals creates substantial demand for phthalimide as an intermediate. India represents another important market, with growing pharmaceutical manufacturing capabilities and increasing domestic agricultural chemical consumption.

North America and Europe maintain important market positions, primarily driven by pharmaceutical applications and high-value specialty chemical production. These regions demonstrate slower growth rates but maintain significance through their focus on high-purity applications and regulatory compliance requirements. The United States and Germany represent key markets within their respective regions, supported by established pharmaceutical industries and specialty chemical capabilities.

Other regions, including Latin America and the Middle East, show emerging potential driven by expanding agricultural activities and growing pharmaceutical manufacturing capabilities, though they currently represent smaller portions of global demand.

Key Market Players and Competitive Landscape

The phthalimide market features a concentrated competitive landscape with several established players maintaining significant market positions through manufacturing capabilities and downstream integration.

Lanxess

Lanxess operates as a major global player in the specialty chemicals sector, with significant capabilities in pharmaceutical and agrochemical intermediates. The company maintains manufacturing facilities in multiple regions and serves diverse end-use markets through its established distribution networks. Lanxess benefits from its integrated position in the specialty chemicals value chain and strong technical

capabilities in fine chemical production.

Jiangsu Lianrun Chemical Co. Ltd.

Jiangsu Lianrun Chemical represents a significant Chinese manufacturer with dedicated phthalimide production capacity of 1,000 tons annually. The company focuses on serving domestic and international markets through cost-competitive production and established quality systems. The company benefits from its location within China's chemical manufacturing hub and access to raw material supply chains.

HuBei XianLong Chemical Industry Co. LTD.

HuBei XianLong Chemical operates as a specialized chemical manufacturer focusing on pharmaceutical and agrochemical intermediates. The company maintains production capabilities for phthalimide and related compounds, serving both domestic Chinese markets and international customers through established trading relationships.

Yancheng Link Weiye Chemical Co. Ltd.

Yancheng Link Weiye Chemical operates with dedicated phthalimide production capacity of 1,200 tons annually, representing one of the larger manufacturing operations in the sector. The company focuses on high-quality production and serves diverse customer segments including pharmaceutical, agrochemical, and specialty chemical manufacturers.

Porter's Five Forces Analysis

Supplier Power: Moderate

The phthalimide industry depends on phthalic anhydride and ammonia as primary raw materials, both of which are available from multiple suppliers globally. However, the quality requirements for pharmaceutical and agrochemical applications create some supplier concentration, particularly for high-purity raw materials. Transportation costs and regional availability influence supplier relationships, while long-term contracts help manage price volatility.

Buyer Power: Moderate to High

Major buyers include large pharmaceutical and agrochemical companies that possess significant purchasing power due to their volume requirements and technical specifications. These buyers often maintain multiple supplier relationships and can influence pricing through competitive bidding processes. However, the specialized nature of phthalimide and switching costs associated with quality validation provide some balance to buyer power.

Threat of New Entrants: Low to Moderate

Entry barriers include the technical expertise required for quality production, regulatory compliance requirements, and the need for established customer relationships in pharmaceutical and agrochemical markets. Capital investment requirements for manufacturing facilities and environmental compliance create additional barriers. However, the relatively straightforward chemistry and established production processes make entry possible for companies with appropriate capabilities.

Threat of Substitutes: Low

Limited substitutes exist for phthalimide in its primary applications, particularly in pharmaceutical synthesis where its properties as a protecting group are well-established. Alternative synthetic routes for specific applications may exist, but the established nature of phthalimide-based processes and regulatory approvals create significant switching barriers.

Competitive Rivalry: Moderate

The industry demonstrates moderate competitive intensity, with competition focused on quality, reliability, and cost competitiveness. Players compete through manufacturing efficiency, customer service, and geographic coverage. Price competition exists but is moderated by quality requirements and the specialized nature of applications.

Market Opportunities and Challenges

Opportunities

The phthalimide market benefits from several growth opportunities driven by expanding end-use applications and geographic market development. The continuing growth of the global pharmaceutical industry creates sustained demand for reliable synthetic intermediates, particularly as drug development becomes more complex and requires sophisticated protecting group strategies. The development of new pharmaceutical compounds and the expansion of generic drug manufacturing in emerging markets provide additional growth potential.

Agricultural market expansion represents another significant opportunity, driven by increasing global food production requirements and the need for more effective crop protection solutions. The development of new pesticide formulations and the expansion of modern agricultural practices in developing countries create additional demand for phthalimide-based intermediates.

Geographic expansion opportunities exist in emerging markets where pharmaceutical and agrochemical manufacturing capabilities are developing. Countries in Southeast Asia, Latin America, and Africa represent potential growth markets as their industrial capabilities expand and domestic demand increases.

Technological advancement in synthetic chemistry may create new applications for phthalimide, particularly in specialty chemical and materials applications. The compound's unique properties and established manufacturing infrastructure position it well for potential new applications.

Challenges

The market faces several challenges that may constrain growth potential. Environmental regulations increasingly focus on chemical manufacturing processes and waste management, requiring ongoing investment in cleaner production technologies and waste treatment capabilities. Regulatory compliance costs continue to increase, particularly for pharmaceutical applications where quality standards are stringent.

Raw material price volatility, particularly for phthalic anhydride, creates margin pressure and requires effective supply chain management. Energy costs associated with production processes and the need for high-temperature reactions contribute to

operational cost pressures.

Competition from alternative synthetic routes and the potential development of substitute compounds pose long-term challenges. While currently limited, ongoing research in synthetic chemistry may develop alternative approaches that could reduce demand for phthalimide in specific applications.

Market concentration among major customers creates dependency risks, as changes in customer strategies or consolidation among pharmaceutical and agrochemical companies could significantly impact demand patterns.

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

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

- 9.1 Phthalimide Market Size
- 9.2 Phthalimide 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 PHTHALIMIDE MARKET IN SOUTH AMERICA (2020-2030)

- 10.1 Phthalimide Market Size
- 10.2 Phthalimide 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 PHTHALIMIDE MARKET IN ASIA & PACIFIC (2020-2030)

- 11.1 Phthalimide Market Size
- 11.2 Phthalimide 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 PHTHALIMIDE MARKET IN EUROPE (2020-2030)

- 12.1 Phthalimide Market Size
- 12.2 Phthalimide 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 PHTHALIMIDE MARKET IN MEA (2020-2030)

- 13.1 Phthalimide Market Size
- 13.2 Phthalimide 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 PHTHALIMIDE MARKET (2020-2025)

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

CHAPTER 15 GLOBAL PHTHALIMIDE MARKET FORECAST (2025-2030)

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

CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS

- 16.1 Lanxess
 - 16.1.1 Company Profile
 - 16.1.2 Main Business and Phthalimide Information
 - 16.1.3 SWOT Analysis of Lanxess
 - 16.1.4 Lanxess Phthalimide Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.2 Jiangsu Lianrun Chemical Co. Ltd.
 - 16.2.1 Company Profile
 - 16.2.2 Main Business and Phthalimide Information
 - 16.2.3 SWOT Analysis of Jiangsu Lianrun Chemical Co. Ltd.
 - 16.2.4 Jiangsu Lianrun Chemical Co. Ltd. Phthalimide Sales, Revenue, Price and Gross Margin (2020-2025)
- 16.3 HuBei XianLong Chemical Industry Co. LTD.
 - 16.3.1 Company Profile
 - 16.3.2 Main Business and Phthalimide Information
 - 16.3.3 SWOT Analysis of HuBei XianLong Chemical Industry Co. LTD.
 - 16.3.4 HuBei XianLong Chemical Industry Co. LTD. Phthalimide Sales, Revenue, Price and Gross Margin (2020-2025)

16.4 Yancheng Link Weiye Chemical Co. Ltd.

16.4.1 Company Profile

16.4.2 Main Business and Phthalimide Information

16.4.3 SWOT Analysis of Yancheng Link Weiye Chemical Co. Ltd.

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

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

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

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

Table 2025-2030 Global Phthalimide Key Vendors Production Value List
Figure 2025-2030 Global Phthalimide Production Value and Growth Rate
Table 2025-2030 Global Phthalimide Key Vendors Production Value Share List
Table 2025-2030 Global Phthalimide Demand List by Type
Table 2025-2030 Global Phthalimide Demand Market Share List by Type
Table 2025-2030 Phthalimide Regional Price List
Table Lanxess Information
Table SWOT Analysis of Lanxess
Table 2020-2025 Lanxess Phthalimide Product Capacity Production Price Cost
Production Value
Figure 2020-2025 Lanxess Phthalimide Capacity Production and Growth Rate
Figure 2020-2025 Lanxess Phthalimide Market Share
Table Jiangsu Lianrun Chemical Co. Ltd. Information
Table SWOT Analysis of Jiangsu Lianrun Chemical Co. Ltd.
Table 2020-2025 Jiangsu Lianrun Chemical Co. Ltd. Phthalimide Product Capacity
Production Price Cost Production Value
Figure 2020-2025 Jiangsu Lianrun Chemical Co. Ltd. Phthalimide Capacity Production
and Growth Rate
Figure 2020-2025 Jiangsu Lianrun Chemical Co. Ltd. Phthalimide Market Share
Table HuBei XianLong Chemical Industry Co. LTD. Information
Table SWOT Analysis of HuBei XianLong Chemical Industry Co. LTD.
Table 2020-2025 HuBei XianLong Chemical Industry Co. LTD. Phthalimide Product
Capacity Production Price Cost Production Value
Figure 2020-2025 HuBei XianLong Chemical Industry Co. LTD. Phthalimide Capacity
Production and Growth Rate
Figure 2020-2025 HuBei XianLong Chemical Industry Co. LTD. Phthalimide Market
Share
Table Yancheng Link Weiye Chemical Co. Ltd. Information
Table SWOT Analysis of Yancheng Link Weiye Chemical Co. Ltd.
Table 2020-2025 Yancheng Link Weiye Chemical Co. Ltd. Phthalimide Product
Capacity Production Price Cost Production Value
Figure 2020-2025 Yancheng Link Weiye Chemical Co. Ltd. Phthalimide Capacity
Production and Growth Rate
Figure 2020-2025 Yancheng Link Weiye Chemical Co. Ltd. Phthalimide Market Share
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