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Adiponitrile Market Forecasts to 2032 – Global Analysis By Production Process (Hydro-cyanation of Butadiene, Electrochemical hydrodimerization of Acrylonitrile and Other Production Processes), Application (Nylon Synthesis, Hexamethylene Diisocyanate (HDI), Electrolyte Solution and Other Applications), End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Adiponitrile Market is accounted for $12.55 billion in 2025 and is expected to reach $25.56 billion by 2032 growing at a CAGR of 10.7% during the forecast period. Adiponitrile is an organic compound with the formula (CH?)?(CN)?. It is made up of two nitrile (–CN) groups on either side of a four-carbon aliphatic chain. It is a colorless liquid with a slight smell that is an essential step in the manufacturing of nylon-6, 6, a synthetic polymer that is used extensively. The main methods for creating adiponitrile are the electrohydrodimerization of acrylonitrile or the hydrocyanation of butadiene. Its production of hexamethylenediamine, which is subsequently polymerized with adipic acid to form nylon-6,6, accounts for its industrial significance. Moreover, adiponitrile needs to be handled carefully because of its reactive nitrile groups, especially when exposed to high temperatures or strong acids or bases.

According to the International Organization of Motor Vehicle Manufacturers (OICA), global automotive production reached 85.01 million units in 2022, reflecting a 5.99% increase compared to 80.20 million units in 2021. The percentage increase is rounded to 6%, which is accurate for general reporting.

Market Dynamics:

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Driver:

Growing interest in nylon 6, 6

An essential component of nylon 6, 6, adiponitrile is a precursor to hexamethylenediamine, which is then polymerized with adipic acid. Renowned for its exceptional mechanical strength, chemical resistance, and thermal stability, nylon 6 is perfect for a variety of industrial uses. Increasingly, nylon 6 is being chosen over traditional materials due to the need for high-performance engineering plastics in demanding settings, such as consumer goods, automotive, and aerospace. Additionally, the strong worldwide demand for nylon 6, 6, particularly in applications requiring load-bearing capacity and dimensional stability, is directly propelling the adiponitrile market's expansion.

Restraint:

Supply chain interruptions and unpredictability of raw materials

Upstream petrochemicals like butadiene and acrylonitrile are essential for the production of adiponitrile. Due to their status as byproducts of natural gas processing and oil refining, these raw materials are subject to changes in regional production, geopolitical tensions, and the price of crude oil. Petrochemical industry delays, price spikes, and shutdowns have resulted from events like the COVID-19 pandemic, the conflict between Russia and Ukraine, and the energy crises in Europe. Any prolonged interruption in the transportation logistics or supply of essential raw materials can have a direct impact on the availability of adiponitrile, raise production costs, and restrict supply to end-use industries.

Opportunity:

Innovation in technology for cost-effective and greener production methods

Opportunities to increase productivity, cut emissions, and save production costs are presented by emerging technologies in the adiponitrile industry. As environmentally friendly substitutes for conventional techniques like hydrocyanation, innovations like electrochemical synthesis, bio-based feedstocks, and sophisticated catalytic systems are attracting more attention. Furthermore, businesses may experience reduced environmental compliance burdens and obtain a competitive advantage in markets with strict sustainability standards if they invest in research and development to optimize

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these next-generation processes.

Threat:

Price fluctuations for energy inputs and raw materials

The production of adiponitrile is heavily reliant on petrochemical-derived feedstock’s like butadiene and acrylonitrile. Due to supply chain interruptions, geopolitical factors, and global crude oil markets, these raw materials are susceptible to large price swings. Furthermore, because adiponitrile synthesis requires a lot of energy, particularly when it is done at high temperatures and pressures, producers are extremely vulnerable to fluctuations in the price of fuel and electricity. Moreover, long-term shortages or spikes in input costs can lower manufacturers' profit margins and deter other polymers with more reliable supply chains from using adiponitrile.

Covid-19 Impact:

Due to manufacturing slowdowns, decreased demand from end-use industries like automotive and textiles, and disruptions in global supply chains, the COVID-19 pandemic had a significant effect on the adiponitrile market. Adiponitrile's primary use, nylon 6, 6, was produced less frequently during the early stages of the pandemic due to lockdowns and transportation restrictions, which reduced demand for the chemical. Furthermore, taxing the supply chain were a number of large chemical plants that either temporarily closed or operated at reduced capacity as a result of safety concerns and a lack of workers.

The Hydro-cyanation of butadiene segment is expected to be the largest during the forecast period

The Hydro-cyanation of butadiene segment is expected to account for the largest market share during the forecast period. The main reasons this process is the most popular industrial way to produce adiponitrile are its high efficiency, proven scalability, and affordability. Large amounts of adiponitrile are created by the catalytic addition of hydrogen cyanide to butadiene, usually with the aid of catalysts based on nickel. Its dominance can be attributed to the extensive commercial optimization of this method by industry leaders such as Invista and Ascend Performance Materials. Moreover, the hydro-cyanation process is preferred because it produces consistent production output, offers high yields, and integrates easily with upstream and downstream chemical manufacturing systems.

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The electrolyte solution segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the electrolyte solution segment is predicted to witness the highest growth rate. The growing demand for lithium-ion batteries worldwide, which use adiponitrile as a high-performance solvent in electrolyte formulations, is the main factor driving this growth. It is a perfect part of next-generation battery technologies for energy storage systems, portable electronics, and electric vehicles (EVs) because of its thermal and electrochemical stability. Additionally, the use of adiponitrile in battery-grade electrolytes is anticipated to rise sharply as nations quicken their shift to clean energy and e-mobility.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by its thriving chemical manufacturing sector and growing downstream uses, especially in the production of nylon. The region's dominance is a result of rapid industrialization, rising demand from the textile and automotive industries, and large infrastructure investments. Because of their large production capacities and expanding export industries, nations like China, India, and South Korea are important players. Furthermore, Asia-Pacific is the leading region in the global adiponitrile market due to the availability of raw materials and supportive government policies.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa region is anticipated to exhibit the highest CAGR. Investments in the chemical and petrochemical sectors are rising, especially in nations like Saudi Arabia and the United Arab Emirates, which is driving this growth. To meet demand from both domestic and international markets, the area is concentrating on growing its manufacturing base and enhancing its infrastructure. Additionally, it is anticipated that during the forecast period, the Middle East and Africa will adopt adiponitrile more quickly due to growing demand from the automotive and textile sectors as well as strategic alliances and collaborations with international players.

Key players in the market

Some of the key players in Adiponitrile Market include BASF SE, Tokyo Chemical Industry Co., Ltd., Solvay SA, Evonik Industries, Ascend Performance Materials Inc,

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Thermo Fisher Scientific Inc, Sumitomo Chemical Co., Ltd., Merck KGaA, Asahi Kasei Corporation, Mitsui Chemicals, Inc., Invista, Vizag Chemical International Inc, Alfa Aesar Inc, Spectrum Chemical Mfg. Corporation and Toray Industries, Inc.

Key Developments:

In April 2025, Chemicals group Solvay launched an expansion on to regain its previous strength in processing rare earths, hoping to attract customers after China imposed new barriers. China implemented export restrictions on certain rare earth elements, a group of 17 minerals, as part of its sweeping response to U.S. President Donald Trump's tariffs.

In March 2025, Evonik has entered into an exclusive agreement with the Cleveland-based Sea-Land Chemical Company for the distribution of its cleaning solutions in the U.S. The agreement builds on a long-standing relationship with the distributor and expands the reach of Evonik’s cleaning solutions to the entire U.S. region.

In December 2024, BASF and Inocas S.A. signed a long-term supplier finance agreement, including offtake of Macauba Kernel Oil and Macauba Pulp Oil, an R&D project and options to acquire equity shares in INOCAS in future. The partnership includes financing of INOCAS’ plans to significantly expand the Macauba oil production in Brazil on an industrial scale, strengthening the country’s position in the bioeconomy.

Production Processes Covered:

- Hydro-cyanation of Butadiene
- Electrochemical hydrodimerization of Acrylonitrile
- Other Production Processes

Applications Covered:

- Nylon Synthesis
- Hexamethylene Diisocyanate (HDI)
- Electrolyte Solution

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- Other Applications

End Users Covered:

- Chemical Intermediate
- Automotive
- Electrical & Electronics
- Textiles
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain

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- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa
- Rest of Middle East & Africa

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What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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