

## **Cumene Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)**

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### **Report description:**

The global cumene market attained a value of USD 22.90 Billion in 2024. The market is further expected to grow in the forecast period of 2025-2034 at a CAGR of 4.30%, to reach USD 34.89 Billion by 2034. Cumene, also known as isopropyl benzene, is an organic compound formed through Friedel-Crafts alkylation of benzene with propylene. This aliphatic substitution process is key in producing cumene, which boils at a temperature suitable for various industrial uses. Increasing demand across applications such as laminates, composites, and plastics is fuelling market growth. Additionally, cumene plays a crucial role in the production of refined fuels and chemical intermediates. These factors are expected to support the expansion of the global cumene market significantly.

The U.S. market shows steady market growth in cumene demand, especially for enamels, lacquers, and paints. Application revenue continues rising, driven by growing cumene usage in steel, iron, and rubber industries, with consumption measured in increasing kilotons annually across various sectors. Cumene production in the U.S., including imports, totals approximately 7 billion pounds each year. This information is gathered by the Environmental Protection Agency (EPA) via the TSCA Chemical Data Reporting (CDR) Form U and is refreshed every four years.

The cumene market is witnessing steady growth due to increasing isopropyl benzene usage in phenols and acetone production. Cumene is primarily used to produce cumene hydroperoxide, an essential intermediate chemical in industrial-scale production. These intermediates play a vital role in the manufacture of phenol and acetone, both of which are widely used across industries such as plastics, pharmaceuticals, and resins, thereby driving the overall expansion of the cumene market.

The stability of cumene is crucial for preventing peroxide formation, which can be triggered by oxidizing agents. Regular safety checks on peroxide content are essential to ensure safe handling. Distillation and heat treatment processes are commonly employed to maintain cumene's stability during production. In India, cumene is governed by the Manufacture, Storage and Import of Hazardous Chemical Rules, 1989, which regulate industrial activities and storage of hazardous chemicals, including cumene.

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## Production Insights

Zeolites are widely used as catalysts in the production of cumene through the Friedel-Crafts alkylation process. Their high surface area and ion-exchange properties make them ideal for facilitating chemical reactions in cumene production. As an effective solid acid catalyst, zeolite provides a more environmentally friendly alternative compared to traditional liquid acids. It enhances reaction selectivity, reduces the formation of unwanted by-products, and allows for better control of the reaction rate. Additionally, zeolites are reusable, leading to lower operational costs and reduced environmental impact due to the minimisation of waste. According to the USGS, in 2023, seven companies managed nine zeolite mines across six states, producing approximately 84,000 tons of natural zeolites. This marked a slight increase in production compared to 2022.

Solid phosphoric acid (SPA) is a widely used catalyst in the production of cumene, particularly in the Friedel-Crafts alkylation reaction. SPA offers high catalytic activity and excellent selectivity, facilitating the alkylation of benzene with propylene to produce cumene with minimal by-products. This solid acid catalyst has a high thermal stability, making it suitable for industrial-scale production, as it can withstand the high temperatures typically involved in the cumene manufacturing process. Furthermore, SPA's long-life cycle and ability to operate at high efficiencies provide significant cost savings and sustainability benefits. The use of SPA in the global cumene market aids in producing high-quality cumene while adhering to environmental regulations, which is crucial as demand for cumene in diverse industries such as plastics, composites, and laminates continues to rise.

Aluminum chloride ( $\text{AlCl}_3$ ) is a key catalyst used in the production of cumene, particularly in the Friedel-Crafts alkylation of benzene with propylene. It offers excellent catalytic properties, significantly enhancing the reaction's efficiency and selectivity.  $\text{AlCl}_3$  has the advantage of high reactivity, which allows for fast conversion rates and increased yields of cumene in the alkylation process. However, its corrosive nature requires careful handling, and its use in the global cumene market has been associated with high operational costs due to the need for stringent safety measures and frequent catalyst regeneration. In September 2023, Primo Chemicals Limited (previously known as Punjab Alkalies & Chemicals Limited) inaugurated an aluminium chloride plant in Naya Nangal, Punjab, with an annual production capacity of 16,500 tons.

## Application Insights

Phenol, a key derivative of cumene, plays a vital role in producing various chemicals such as plastics, resins, and detergents. Its primary use is in the production of Bisphenol A (BPA), which is crucial for manufacturing polycarbonate plastics and epoxy resins. In September 2023, Haldia Petrochemicals Ltd (HPL) announced an investment of Rs 2,000 crore to expand its phenol and acetone plant in Haldia. This expansion aimed to increase phenol production from 300 KTPA to 345 KTPA.

Acetone, another major product from cumene, is widely used as a solvent in industrial and commercial applications, including paints, coatings, and cleaning products. It's also essential in the production of plastics, textiles, and pharmaceuticals. The increasing demand for acetone, particularly in the paint and coatings industry, drives the global cumene market. Acetone's versatility in various sectors, including automotive, construction, and personal care, enhances its importance, contributing to market growth and ensuring stable cumene demand.

Cumene-derived acetone is a key solvent in the formulation of paints and enamels. These industries rely heavily on acetone for its ability to dissolve pigments and resins, ensuring smooth application and high-quality finishes. As global demand for decorative paints, industrial coatings, and automotive finishes increases, the consumption of acetone and, consequently, cumene rises. In December 2023, Ineos Phenol began operations at Europe's largest cumene plant in Marl, Germany. The facility, with an annual capacity of 750,000 tons, significantly reduces CO<sub>2</sub> emissions and utilises nearby industrial infrastructure for efficiency.

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Cumene is essential in the production of high-octane aviation fuels, crucial for the aerospace industry. Acetone, derived from cumene, is used in blending fuel additives that enhance performance, efficiency, and safety. The growing demand for air travel, along with the aviation sector's focus on improving fuel efficiency and reducing emissions, increases the need for high-octane fuels. This, in turn, drives the demand for cumene, reinforcing its significance in the global market and supporting its continued growth in the aerospace industry.

#### End Use Industry Insights

In the global cumene market, plastics benefit significantly due to cumene's role in producing phenol and acetone, key ingredients in the production of resins and polymers. Cumene-based phenol is essential for creating epoxy resins, which are widely used in plastics manufacturing. The increasing demand for durable, lightweight plastics in industries like packaging, construction, and consumer goods boosts the need for cumene, enhancing its market growth. As the plastics industry expands, so does the demand for cumene-derived products.

Cumene plays a crucial role in the automotive industry by providing phenol and acetone for producing materials like synthetic rubber and plastic components. These materials are essential in automotive manufacturing for creating fuel-efficient, lightweight vehicles. Additionally, cumene is used in the production of adhesives, paints, and coatings for automotive parts. According to statistics from Canada, the total number of road motor vehicles registered reached 26.3 million in 2022, a 0.3% increase from 2021. This growth boosts the global cumene market by increasing demand for automotive materials like plastics, coatings, and adhesives.

Cumene is a key feedstock in the chemical industry, particularly for producing phenol and acetone, which are essential for producing various chemicals like adhesives, plastics, and solvents. As a fundamental building block, it supports the synthesis of many industrial chemicals used in manufacturing and pharmaceuticals. The global growth in chemical manufacturing, including the rise in demand for bio-based and sustainable products, positively impacts the demand for cumene, thus strengthening its position in the global market.

Cumene's contribution to the paint industry is crucial, as it is a key raw material in producing phenol, which is used in the production of resins and coatings. These resins form the foundation for various paints and varnishes. With rising demand for high-quality, durable coatings across automotive, construction, and industrial sectors, the paint industry's need for cumene-derived products continues to grow. China, the largest construction market globally, focuses on new infrastructure projects like transportation, energy, and water systems under its 14th Five-Year Plan. This boosts the cumene market by increasing demand for chemicals used in building materials like adhesives, coatings, and plastics.

#### Regional Insights

North America holds a strong position in the global cumene market due to its well-established petrochemical sector and advanced industrial infrastructure. The United States remains a key contributor, driven by high demand for phenol and acetone in the automotive and construction industries. The United States recorded a motor vehicle production of 10,611,555 units in December 2023, marking a rise from 10,052,958 units reported in December 2022.

#### Europe Cumene Market Trends

Europe's cumene market benefits from robust demand across the automotive, pharmaceutical, and coatings sectors. Countries such as Germany, France, and the Netherlands are leading contributors, supported by advanced manufacturing and chemical processing facilities. The EU's increasing regulatory focus on chemical safety, including the reclassification, is pushing producers to adopt safer alternatives and invest in greener technologies. Strategic collaborations and infrastructure integration also enhance

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regional market efficiency.

#### Asia Pacific Cumene Market Trends

Asia Pacific dominates the global cumene market, led by China, India, and Japan. Rapid industrialisation, urbanisation, and infrastructure development are key growth drivers, particularly in construction, automotive, and plastics. The region's large population and rising disposable income also fuel consumer demand for end products made from phenol and acetone. IOCL selected Lummus' cumene technology for a new 440 KTPA unit in Paradip, enhancing energy efficiency, yield, and supporting its petrochemical expansion and long-standing partnership with Lummus in India.

#### Latin America Cumene Market Trends

Latin America is witnessing steady growth in the cumene market, with Brazil and Mexico emerging as primary contributors. Expanding industrial and construction activities, coupled with increasing investment in the chemical sector, are fuelling demand. While the region faces challenges such as limited technological infrastructure, efforts to modernise production facilities and improve trade connectivity are encouraging. Rising demand for paints, adhesives, and plastics supports further market development across Latin America.

#### Middle East and Africa Cumene Market Trends

The Middle East and Africa region is gradually emerging as a significant player in the cumene market. The abundance of crude oil and petrochemical feedstocks in countries like Saudi Arabia and the UAE supports regional production. Infrastructure projects and diversification plans under initiatives such as Saudi Vision 2030 drive demand for phenol and acetone derivatives. Meanwhile, growing urbanisation and industrialisation across Africa present new opportunities for market expansion.

#### Cumene Market Share Insight

The global cumene market is shaped by the presence of several key players who significantly influence industry trends, innovation, and competitive dynamics. Major market participants such as INEOS Group, Dow Inc., Royal Dutch Shell, SABIC, and ExxonMobil dominate the landscape through their extensive production capacities, strategic expansions, and advanced technologies. These companies focus on enhancing product quality, improving sustainability, and meeting the growing demand for cumene across various applications. Through collaborations, technological advancements, and geographic expansion, these market leaders continue to strengthen their foothold while driving the overall growth and development of the global cumene industry.

#### Dow Chemical Company

Dow is a leading global materials science company, providing innovative and sustainable solutions across packaging, infrastructure, and consumer care. It plays a significant role in the chemical industry, including the production of cumene and derivatives.

#### ExxonMobil Corporation

ExxonMobil is a major integrated energy and chemical company. It operates through upstream, downstream, and chemical segments, producing essential raw materials like cumene for use in plastics, resins, and other industrial applications globally.

#### BASF SE

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BASF is a global chemical manufacturer delivering products across various sectors, including agriculture, automotive, and construction. It is actively involved in the cumene market, contributing to phenol and acetone production for wide-ranging industrial applications.

#### INEOS Group

INEOS is a large multinational chemicals company with a broad portfolio spanning petrochemicals, speciality chemicals, and oil products. It is a key producer of cumene, supporting the supply chain for phenol, acetone, and related chemical derivatives.

#### Total S.A.

Total is a diversified energy and chemicals company involved in oil, natural gas, and low-carbon energy production. Its chemical division includes the production of base chemicals like cumene, playing a role in various industrial and consumer goods markets.

#### Key Players in the Cumene Market:

- ? Braskem S.A.
- ? Lummus Technology
- ? Domo Chemicals GmbH
- ? Exxon Mobil Corporation
- ? Borealis AG
- ? Sumitomo Corporation
- ? ENEOS Holdings, Inc.
- ? Dow Chemical Company
- ? JX Holdings
- ? BASF SE
- ? China Petroleum & Chemical Corporation
- ? Saudi Basic Industries Corporation
- ? INEOS Group
- ? Total S.A.
- ? Sinopec Group Ltd.
- ? Others

#### Segments Covered in the Report

The global cumene market has witnessed significant volume and revenue growth, driven by evolving industry trends across global, regional, and country levels. Detailed market segmentation by production, application, and region has highlighted key growth areas and emerging opportunities. During the forecast period from 2025 to 2034, increased demand in sectors such as plastics, paints, and chemicals is expected to contribute to sustained expansion, shaping the market's future trajectory and competitive landscape.

#### Production Outlook (Revenue, Billion, 2025-2034)

- ? Aluminum Chloride Catalyst
- ? Solid Phosphoric Acid (SPA) Catalyst
- ? Zeolite Catalyst

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Application Outlook (Revenue, Billion, 2025-2034)

- ? Phenol
- ??? Phenol Resins
- ??? Caprolactam
- ??? Bisphenol A
- ??? Alkyl phenols
- ??? Others

- ? Acetone
- ??? Solvent Use
- ??? Methyl Methacrylate
- ??? Aldol Chemicals
- ??? Others

- ? Paints and Enamels
- ? High-octane Aviation Fuels
- ? Others

End Use Industry Outlook (Revenue, Billion, 2025-2034)

- ? Plastics Industry
- ? Automotive Industry
- ? Chemical Industry
- ? Paint Industry
- ? Rubber Industry
- ? Others

Region Outlook (Revenue, Billion, 2025-2034)

- ? North America
- ??? United States of America
- ??? Canada

- ? Europe
- ??? United Kingdom
- ??? Germany
- ??? France
- ??? Italy
- ??? Others

- ? Asia Pacific
- ??? China
- ??? Japan
- ??? India
- ??? ASEAN

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??? Australia

??? Others

? Latin America

??? Brazil

??? Argentina

??? Mexico

??? Others

? Middle East and Africa

??? Saudi Arabia

??? United Arab Emirates

??? Nigeria

??? South Africa

??? Others

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