

## **Purified Terephthalic Acid - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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### **Report description:**

Purified Terephthalic Acid Market Analysis

The Purified Terephthalic Acid Market size is estimated at 93.45 Million tons in 2025, and is expected to reach 122.14 Million tons by 2030, at a CAGR of 5.5% during the forecast period (2025-2030). Strong polyethylene terephthalate (PET) demand across packaging, textile and emerging automotive end-uses underpins this expansion, even as mature regions restructure capacity. Integration of petrochemical chains in China and India is reinforcing cost leadership, while chemical recycling technologies are unlocking fresh sources of feedstock and premium price pools. Feedstock volatility is narrowing margins for stand-alone producers, prompting a visible shift toward backward integration and operational efficiencies. Regulatory pushes for higher recycled content in PET packaging, especially in the European Union, are reshaping procurement strategies and spurring investment in closed-loop systems.

Global Purified Terephthalic Acid Market Trends and Insights

Strong PET Packaging Demand from E-commerce Sector

E-commerce shipping formats now favor lightweight PET containers that withstand automated sortation and long transit cycles, driving higher-grade PTA offtake. Brands in India and Southeast Asia are adopting barrier-enhanced bottles that preserve carbonation and flavor during direct-to-consumer delivery peaks. Quarterly promotions such as Singles' Day and Diwali generate sudden PTA call-offs, keeping regional inventories tight and sustaining spot premiums. North American food and beverage

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suppliers are also redesigning packaging for parcel carriers, lifting PTA specifications for stress-crack resistance. These design changes convert glass and metal volumes to PET, broadening the purified terephthalic acid market in both volume and value terms. Seasonal spikes incentivize supply contracts with formula-based pricing that protect converters from PX price swings.

### Growing Production of Polyester Fiber

China's integrated PTA-to-fiber parks leverage onsite utilities and logistics synergies to deliver cost-effective fiber at scale, anchoring long-term PTA demand. Indian refiners are following suit; IndianOil is lifting PTA capacity from 553,000 tons to 700,000 tons at Panipat and adding a 1.2 million-ton line at Paradip by mid-2026, cementing India's role as a swing supplier. Automotive nonwovens, geotextiles and functional apparel continue to diversify end-uses for polyester fibers, each requiring narrow PTA impurity windows that command a modest price premium. Sinopec Yizheng's incremental 60,000 tons of polybutylene terephthalate illustrates strategic migration into engineering polymers that buffer against PET cyclicity. The durable-goods orientation of these fibers supports steadier purified terephthalic acid market volumes compared with fashion cycles.

### Toxicological Concerns

ECHA registration dossiers classify terephthalic acid in the 1-10 million-ton production band within the European Economic Area, prompting heightened scrutiny over wastewater and dust exposures. Although oral LD50 values exceed 5,000 mg/kg, newer reproductive studies have led regulators to propose stricter monitoring of plant effluents. Small and mid-size producers lacking advanced treatment systems face capital outlays or possible shutdowns, trimming short-term purified terephthalic acid market capacity in Europe. Compliance costs also rise under the EU's General Product Safety Regulation, requiring manufacturers to document the safety of PTA-derived finished goods before market entry.

Other drivers and restraints analyzed in the detailed report include:

Growing Utilization of PET from Automotive Industry / Recycled-PET Loop Mandates / Volatile PX & Crude Prices /

For complete list of drivers and restraints, kindly check the Table Of Contents.

### Segment Analysis

Polyethylene terephthalate represented 64.18% of global derivative consumption in 2024, translating into the bulk of purified terephthalic acid market demand. Integrated players convert PTA to PET on-site, securing conversion margins and logistical savings that reinforce competitive barriers. The segment's anticipated 6.56% CAGR reflects both volume growth and higher-value resins for hot-fill, refillable and barrier-enhanced packaging. Polybutylene terephthalate remains a specialty derivative with stronger heat resistance, and Sinopec Yizheng's 80,000-ton expansion underscores the material's automotive and electronics prospects. Polytrimethylene terephthalate is carving out a niche in functional sportswear, benefiting from its elastic recovery and softness.

Economic analyses now favor direct esterification of PTA over dimethyl terephthalate (DMT). Oxxynova's 2022 closure of its German DMT unit underlined structural cost disadvantages. Nonetheless, catalytic processes achieving 99.9% DMT yields from PET waste demonstrate a pathway to circular DMT streams if policy incentives materialize. Overall, PET integration strategies continue to anchor the purified terephthalic acid market, while higher-margin derivatives diversify revenue against PET price cycles.

The Purified Terephthalic Acid Market Report Segments the Industry by Derivative (Polyethylene Terephthalate (PET), Polybutylene Terephthalate (PBT), and More), Technology (PX Oxidation (Conventional), Bio-Based PTA, and More), Application

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(Packaging, Fibers, and More), and Geography (Asia-Pacific, North America, Europe, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Volume (Tons).

## Geography Analysis

Asia-Pacific retained 53.62% share of global PTA consumption in 2024 and is set to grow 7.18% annually, reflecting integrated aromatics-to-polyester investments in China and India. China's record 14.8 million barrels per day crude throughput enables ample PX feed, while Sinopec's 3 million-ton single-train PTA plant in Jiangsu epitomizes economies of scale. India is emerging as a balancing supplier; IndianOil's expansions at Panipat and Paradip will lift national PTA output by 1.35 million tons before mid-2026. South Korea and Japan focus on high-value resins and process licensing, whereas Southeast Asian producers exploit proximity to feedstock sources and burgeoning domestic demand. These dynamics cement Asia-Pacific's status as the engine room of the purified terephthalic acid market.

North America's purified terephthalic acid market benefits from competitive natural-gas liquids feed and established recycling infrastructure. Demand from carbonated soft-drink giants and rising automotive PET usage maintain utilization rates, yet new grassroots capacity remains limited as investors favor debottlenecking and integration with paraxylene units. Europe confronts structural headwinds from high energy costs and tightened emissions schemes. Facility rationalizations, such as Indorama's review of Rotterdam operations, signal a pivot toward specialty grades and recycled feedstock rather than green-field PTA additions. Anti-dumping duties on Asian PET imports offer temporary relief but do not offset the region's feedstock disadvantage.

South America and the Middle East & Africa present emerging growth avenues. Brazil's polyester chain draws attention from multinational players eyeing stakes in Braskem to secure domestic market access. In the Middle East, SABIC's USD 6.4 billion Fujian complex and TotalEnergies' USD 11 billion Amiral project illustrate a strategy to integrate refining, PX and PTA units, then channel output into high-growth Asian markets. These long-cycle investments will gradually widen the geographic footprint of the purified terephthalic acid market, balancing demand clusters against feedstock availability.

### List of Companies Covered in this Report:

Alpek S.A.B. de C.V. / BP p.l.c. / China Petroleum & Chemical Corporation. / Eastman Chemical Company / FCFC / HENGLI PETROCHEMICAL ( DALIAN ) CHEMICAL CO., LTD. / Indian Oil Corporation Ltd / Indorama Ventures Public Company Limited. / INEOS / JBF Industries Limited / LOTTE Chemical Corporation. / Mitsubishi Chemical Corporation. / Oriental Petrochemical (Taiwan) Co., Ltd. / PetroChina Company Limited / Reliance Industries Limited / SABIC / Samnam Petrochemical Co.,Ltd. /

### Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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