

# Global 1,4-Butanediol Market Size Study & Forecast, by Application (Tetrahydrofuran, Polybutylene Terephthalate, Polyurethane) and Regional Forecasts 2025–2035

<https://marketpublishers.com/r/G66770F9127AEN.html>

Date: July 2025

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: G66770F9127AEN

## Abstracts

The Global 1,4-Butanediol (BDO) Market is valued at approximately USD 7.68 billion in 2024 and is projected to expand at a robust CAGR of 9.90% over the forecast period from 2025 to 2035. 1,4-Butanediol, a critical intermediate chemical, plays a pivotal role in producing high-performance polymers, solvents, and elastic fibers across a myriad of industrial applications. As industries seek materials that deliver enhanced flexibility, durability, and thermal resistance, BDO continues to be indispensable—especially in the production of Tetrahydrofuran (THF), Polybutylene Terephthalate (PBT), and Polyurethanes. With surging demand in electronics, automotive, construction, and textile sectors, the market has witnessed a paradigm shift towards more sustainable and efficient production routes. Companies are actively investing in bio-based alternatives and catalytic technologies to address environmental concerns and regulatory challenges, thus creating a compelling opportunity for next-generation BDO solutions.

The growing penetration of BDO in emerging industries, including biodegradable plastics and spandex fibers, is significantly contributing to its upward trajectory. For instance, THF, which is derived from BDO, is a key ingredient in the manufacture of spandex—an industry witnessing rampant demand in performance textiles and sportswear. Similarly, the proliferation of electric vehicles and consumer electronics has bolstered the requirement for PBT due to its insulating properties and chemical resistance. Additionally, polyurethane, synthesized from BDO, continues to gain traction in flexible foams, coatings, adhesives, and sealants. However, despite its growing adoption, the market faces headwinds from volatile raw material prices and increasing

competition from green chemistry innovations. Nonetheless, rapid technological advancements in fermentation-based BDO and shifts toward circular economy models are mitigating these limitations and carving fresh growth avenues.

From a geographical perspective, North America currently holds a prominent share in the global BDO market, supported by mature end-user industries, established R&D infrastructure, and aggressive clean-tech adoption. The United States, in particular, is leading in bio-based BDO research and commercialization. Europe follows closely, driven by stringent environmental regulations and high demand for recyclable polymers in automotive and packaging industries. Meanwhile, Asia Pacific is poised to exhibit the fastest growth throughout the forecast timeline. This regional upsurge is primarily attributed to expanding industrial activity, favorable government policies, and escalating demand for consumer goods and textiles across China, India, and Southeast Asia. Additionally, increasing foreign investments in regional chemical manufacturing hubs are further amplifying market potential in APAC.

Major market player included in this report are:

BASF SE

Mitsubishi Chemical Group

Genomatica, Inc.

Dairen Chemical Corporation

Ashland Global Holdings Inc.

LyondellBasell Industries N.V.

Xinjiang Tianye Co., Ltd.

Markor Chemical Industry Co., Ltd.

Invista

Sipchem

BioAmber Inc.

Nan Ya Plastics Corporation

Taiwan International Chemical Corp. (TIC)

Shanxi Sanwei Group Co., Ltd.

Eastman Chemical Company

#### Global 1,4-Butanediol Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players.

The detailed segments and sub-segments of the market are explained below:

*Global 1,4-Butanediol Market Size Study & Forecast, by Application (Tetrahydrofuran, Polybutylene Terephthalat...*

**By Application:**

Tetrahydrofuran (THF)

Polybutylene Terephthalate (PBT)

Polyurethane

**By Region:****North America**

U.S.

Canada

**Europe**

UK

Germany

France

Spain

Italy

Rest of Europe

**Asia Pacific**

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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