

Global BR Latex Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global BR Latex market size is expected to reach \$ 2525 million by 2032, rising at a market growth of 5.2% CAGR during the forecast period (2026-2032).

BR Latex, also called Polybutadiene Rubber Latex, is a synthetic rubber latex produced through the emulsion polymerization of butadiene monomer. It consists of finely dispersed polybutadiene rubber particles in water and is mainly used as a rubber-phase intermediate in impact-modified polymer systems. Its most important application is in ABS resin production, where polybutadiene latex is grafted with styrene and acrylonitrile to form a high-rubber graft component that improves impact strength, toughness, low-temperature resistance, and overall mechanical performance.

Unlike solid polybutadiene rubber, BR latex is usually not traded as a large-volume standalone commodity; in many ABS plants, it is produced and consumed internally as a process intermediate. Direct merchant sales are relatively limited and are mainly supplied to producers of ABS, MBS impact modifiers, ASA/AAS resin systems, core-shell impact modifiers, and specialty polymer materials. In 2025, global BR Latex production is estimated at approximately 1.53 million tons on a wet latex basis, equivalent to about 0.83 million tons on a dry solids basis; the global average selling price is estimated at around USD 1,120 per ton of wet latex, or about USD 2,070 per ton on a dry solids basis, with a typical economic single-line capacity of 30,000–80,000 tons per year of wet latex and a mainstream gross margin range of approximately 15%–25%. Global BR Latex, namely Butadiene Rubber Latex or Polybutadiene Latex, is a butadiene-based synthetic rubber latex mainly used to provide rubber phase, toughness, and impact resistance to downstream polymer systems. Its core demand does not come from general latex coating or ordinary rubber goods, but from ABS resin impact modification, MBS impact modifiers, ASA/AAS resin systems, and selected core-

shell polymer modifiers. The product sits between basic synthetic rubber and functional polymer intermediates: it is exposed to the cyclicity of the butadiene value chain while also carrying the formulation-driven characteristics of engineering plastic modification. Regionally, the market is strongly linked to ABS and impact modifier production. Asia-Pacific is the largest production and consumption region, with China, Japan, South Korea, Taiwan, and Southeast Asia forming a relatively complete value chain around ABS, MBS, and engineering plastic modification. China, in particular, is supported by ABS capacity additions and demand from appliances, electrical and electronic products, automotive components, and modified plastics, with a large share of BR Latex produced and consumed captive within ABS production systems. Europe and North America are more mature markets, with demand concentrated in automotive, industrial components, electrical and electronic applications, weatherable materials, and specialty modification systems. In trade terms, BR Latex is not a highly commoditized long-distance traded product because it is waterborne, has limited solid content, and requires controlled storage, transport, and formulation compatibility. It is therefore more commonly produced and consumed regionally or within integrated production chains. Public product information identifies Polybutadiene Latex as an ABS impact resistant material, and typical grades are supplied as medium-to-high-solids waterborne latex, which reinforces its process-sensitive and logistics-constrained nature.

In terms of market drivers, BR Latex growth is mainly supported by the continuing need for toughness, impact strength, low-temperature performance, surface quality, and processing stability in ABS, MBS, ASA/AAS, and core-shell impact modifier systems. ABS resin remains the largest demand driver, with applications in appliance housings, consumer electronics, automotive interior and exterior parts, office equipment, toys, building materials, and industrial components. These applications require lightweight design, dimensional stability, good appearance, and impact resistance, which maintain the role of BR Latex in emulsion-grafted ABS and high-rubber-content components. MBS and core-shell impact modifiers provide additional demand, particularly in PVC, engineering plastics, and transparent or semi-transparent modification systems, where particle size distribution, gel content, latex stability, and grafting efficiency are important performance parameters. Market growth is also influenced by butadiene feedstock prices, styrene and acrylonitrile chain volatility, ABS capacity ramp-up, environmental regulation, customer qualification cycles, and process route selection. Continuous mass ABS routes, solid rubber modification routes, and externally purchased HRG or ABS powder can absorb part of the demand that would otherwise be linked to captive latex production; however, BR Latex remains a key intermediate in emulsion-grafted ABS, MBS, and core-shell impact modifier systems. Overall, the global BR Latex market is expected to grow at a moderate pace, with Asia-Pacific as the main growth center and

Europe and North America focusing more on product upgrading and high-performance grades. Market expansion is more closely tied to actual ABS and impact modifier output than to nominal capacity expansion alone. Public ABS market sources indicate that global ABS demand remains on a growth path, supported by automotive lightweighting, electrical and electronic applications, and consumer goods.

This report studies the global BR Latex production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for BR Latex and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of BR Latex that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global BR Latex total production and demand, 2021-2032, (Tons)

Global BR Latex total production value, 2021-2032, (USD Million)

Global BR Latex production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global BR Latex consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: BR Latex domestic production, consumption, key domestic manufacturers and share

Global BR Latex production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global BR Latex production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global BR Latex production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global BR Latex market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ZEON, LG Chem, CHIMEI, Formosa Chemicals & Fibre, Liaoning Kingfa, Tianjin Dagu Chemical, CNPC, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World BR Latex market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global BR Latex Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global BR Latex Market, Segmentation by Type:

Small-particle BR Latex

Large-particle BR Latex

Others

Global BR Latex Market, Segmentation by Solid Content:

Low-solids BR Latex

Standard-solids BR Latex

High-solids and Concentrated BR Latex

Global BR Latex Market, Segmentation by Application:

ABS Resin

MBS Impact Modifier

Others

Companies Profiled:

ZEON

LG Chem

CHIMEI

Formosa Chemicals & Fibre

Liaoning Kingfa

Tianjin Dagu Chemical

CNPC

Key Questions Answered:

1. How big is the global BR Latex market?
2. What is the demand of the global BR Latex market?
3. What is the year over year growth of the global BR Latex market?

4. What is the production and production value of the global BR Latex market?
5. Who are the key producers in the global BR Latex market?
6. What are the growth factors driving the market demand?

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