

# Global BR Latex Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global BR Latex market size was valued at US\$ 1764 million in 2025 and is forecast to a readjusted size of US\$ 2525 million by 2032 with a CAGR of 5.2% during review period.

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 captively 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 is a detailed and comprehensive analysis for global BR Latex market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

#### Key Features:

Global BR Latex market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global BR Latex market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global BR Latex market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global BR Latex market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 2021-2026

#### The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for BR Latex

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global BR Latex market based on the following parameters - company overview, sales quantity, revenue, 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.

### Market Segmentation

BR Latex market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Type

Small-particle BR Latex

Large-particle BR Latex

Others

#### Market segment by Solid Content

Low-solids BR Latex

Standard-solids BR Latex

High-solids and Concentrated BR Latex

#### Market segment by Application

ABS Resin

MBS Impact Modifier

Others

Major players covered

ZEON

LG Chem

CHIMEI

Formosa Chemicals & Fibre

Liaoning Kingfa

Tianjin Dagu Chemical

CNPC

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe BR Latex product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of BR Latex, with price, sales quantity, revenue, and global market share of BR Latex from 2021 to 2026.

Chapter 3, the BR Latex competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the BR Latex breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and BR Latex market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of BR Latex.

Chapter 14 and 15, to describe BR Latex sales channel, distributors, customers, research findings and conclusion.

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