

Global Butadiene Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Butadiene market size is expected to reach \$ 21500 million by 2032, rising at a market growth of 2.1% CAGR during the forecast period (2026-2032).

Butadiene, also known as 1, 3-butadiene is either in gaseous or refrigerated liquid state and its monomer has many commercial uses. Butadiene is inflammable in nature and needs to be handled with immense care and precision. The main supply of Butadiene is extracted from the mixed c4 stream produced in steam crackers, the c4 stream composition and yield depending on operations severity and feedstocks. In 2024, global Butadiene production reached approximately 15033 K MT, with an average global market price of around US\$ 1200 per MT.

The butadiene industry chain begins upstream in steam crackers where a C₄ stream (butenes, butanes, butadiene, isobutene) is co-produced when cracking naphtha, condensate, or LPG. Butadiene is then isolated—traditionally by extractive distillation (solvent extraction) or via dehydrogenation of n-butane/butenes for “on-purpose” supply that decouples output from cracker coproducts. Midstream, purified 1,3-butadiene feeds multiple elastomer and resin units: SBR (emulsion/solution) and PBR for tires; SB latex for paper, carpet, and adhesives; NBR for seals, hoses, and gloves; ABS (via polybutadiene rubber in the SAN matrix) for appliances, electronics, and auto trim; plus smaller volumes into chloroprene rubber, adiponitrile (nylon 6,6 route), and specialty chemicals. Downstream, demand consolidates in transportation (tires, belts, vibration control), industrial goods, packaging/consumer durables, and construction-related coatings and carpets, with OEM qualification and compounding know-how creating switching costs that favor established suppliers.

Market drivers are a blend of autos/tires cycle, cracker slate choices, and regional

capacity additions. Tire replacement and OEM production set the tone for SBR/PBR, while homebuilding and consumer durables sway SB latex and ABS. On the supply side, the share of light-feed (ethane) cracking shapes global tightness by reducing C₂ coproducts, prompting investment in on-purpose dehydrogenation to balance deficits near tire hubs. Trade policies and logistics (deep-sea cargoes, refrigerated or pressurized transport, derivative arbitrage) modulate regional prices, while energy and naphtha/LPG spreads ripple through extraction economics. Longer-term, OEM and brand-owner sustainability goals are nudging interest in bio-based butadiene routes (ethanol-to-BD, biochemical C₂s) and mass-balance certifications, though scale and cost remain the gating issues; in parallel, higher-performance tires (labeling rules for rolling resistance/wet grip) support a gradual mix shift toward S-SBR and advanced PBR grades.

Industry profitability is highly cyclical. For merchant butadiene (monomer), gross profit margins tend to swing from low single digits in oversupplied phases to very high spikes during dislocations (turnarounds, outages, or tight cracker coproduct supply); over a cycle, many producers target mid-single to low-teens gross margins, with the best results coming from integrated sites that optimize across the C₂ chain. Derivative producers (SBR, PBR, NBR, SB latex, ABS) generally exhibit more stable mid-teens gross margins in balanced markets, with dispersion by product: commodity E-SBR/SB latex often at the lower end, S-SBR/PBR for high-performance tires and ABS nearer the upper end, and specialty grades or captive integration (e.g., ABS with downstream compounding) occasionally exceeding that. Location matters: plants adjacent to captive crackers or advantaged LPG/naphtha, with reliable utilities and logistics, typically sit several points of margin above toll/merchant models due to feedstock, energy, and freight advantages.

What ultimately determines where a producer lands on that spectrum is portfolio mix and integration (access to C₂s, optionality into butenes/isobutene and MTBE/ETBE), operational reliability (solvent recovery, energy intensity of extraction/dehydrogenation), and customer stickiness (tire and ABS qualifications, technical service, supply assurance). In tight cycles, monomer sellers capture outsized uplift; in long soft patches, differentiated derivatives and integrated networks preserve average margins while pure merchants feel the compression. Over the next few years, expect incremental on-purpose BD near demand centers, continued shift to higher-spec elastomers, and selective rationalization of small, high-cost extraction units—dynamics that should modestly flatten the worst of the boom-bust while keeping butadiene a structurally cyclical chain tied to transport and consumer goods.

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

This report is a detailed and comprehensive analysis of the world market for Butadiene 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 Butadiene that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Butadiene total production and demand, 2021-2032, (K MT)

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

Global Butadiene production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Butadiene consumption by region & country, CAGR, 2021-2032 & (K MT)

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

Global Butadiene production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K MT)

Global Butadiene production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Butadiene production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Butadiene 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 Sinopec, TPC, Braskem, Shell Chemical, CNPC, FPCC, BASF, ExxonMobil, ENEOS Materials Corporation, Lotte, 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 Butadiene market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Butadiene Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Butadiene Market, Segmentation by Type:

Extractive Distillation

Oxidative Dehydrogenation

Global Butadiene Market, Segmentation by Content:

99% Content

99.5% Content

Global Butadiene Market, Segmentation by Channel:

Online Sales

Offline Sales

Global Butadiene Market, Segmentation by Application:

Styrene Butadiene Rubber (SBR)

Butadiene Rubber (BR)

Styrene Butadiene Latex (SBL)

Acrylonitrile Butadiene Styrene (ABS)

Adiponitrile

Other

Companies Profiled:

Sinopec

TPC

Braskem

Shell Chemical

CNPC

FPCC

BASF

ExxonMobil

ENEOS Materials Corporation

Lotte

LyondellBasell

Ineos O&P

LG Chem

Sabina

Evonik

Key Questions Answered:

1. How big is the global Butadiene market?
2. What is the demand of the global Butadiene market?
3. What is the year over year growth of the global Butadiene market?
4. What is the production and production value of the global Butadiene market?
5. Who are the key producers in the global Butadiene market?
6. What are the growth factors driving the market demand?

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