

Global Nitrile Butadiene Rubber (NBR) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Nitrile Butadiene Rubber (NBR) market size is expected to reach \$ 3437 million by 2032, rising at a market growth of 3.7% CAGR during the forecast period (2026-2032).

Nitrile Butadiene Rubber (NBR), also known as acrylonitrile-butadiene rubber or Buna-N, is a synthetic elastomer produced by the copolymerization of acrylonitrile (ACN) and butadiene monomers. This composition provides NBR with an exceptional combination of mechanical strength, resistance to oils, fuels, and other chemicals, and stability across a wide temperature range. NBR's unique chemical structure makes it a key material in industrial, automotive, oil and gas, and consumer applications that require durable and resilient elastomers. It is widely used in the manufacture of seals, gaskets, hoses, O-rings, gloves, belts, and molded products where performance under exposure to hydrocarbons and lubricants is essential. The market for NBR, therefore, forms a critical part of the global synthetic rubber industry and is closely tied to industrial production, automotive manufacturing, and the broader trends in materials science and energy technology.

From a production perspective, NBR is typically manufactured through emulsion polymerization of acrylonitrile and butadiene in water using surfactants, initiators, and stabilizers. The proportion of acrylonitrile in the polymer significantly influences the final material properties: higher ACN content enhances oil and fuel resistance but reduces flexibility at low temperatures, while lower ACN content improves elasticity and cold resistance but decreases chemical resistance. This tunable nature allows NBR producers to tailor products for specific applications ? from low-temperature gaskets in cold environments to oil-resistant seals in automotive engines. Over the past several decades, manufacturers have optimized emulsion polymerization techniques,

introduced continuous production processes, and improved coagulant recovery and energy efficiency, helping to expand the global availability and performance diversity of NBR grades.

In 2024, global Nitrile Butadiene Rubber (NBR) production reached approximately 978.4 K MT, with an average global market price of around US\$ 2,559 per MT. The global single-line production capacity ranges from 15 to 20 K MT per year. The industry's gross profit margin is approximately 20%-25%.

Looking ahead, the market development perspective for NBR is defined by a balance between mature industrial applications and emerging innovations. On one hand, the material's well-established role in automotive, oil-resistant, and industrial sealing applications ensures stable baseline demand. On the other hand, the gradual electrification of transportation, heightened environmental regulations, and material substitution pressures from advanced thermoplastic elastomers (TPEs) and fluoroelastomers introduce a need for strategic adaptation. Producers are likely to invest in product diversification ? emphasizing performance differentiation, cost efficiency, and sustainability ? to maintain competitiveness. Integration of NBR production with downstream rubber compounding, glove manufacturing, and engineered sealing systems will also strengthen supply chain resilience and value capture.

Nitrile Butadiene Rubber stands as a cornerstone of the synthetic elastomer industry, bridging the technical requirements of oil resistance, mechanical strength, and manufacturability across a wide range of applications. Its market has evolved from wartime substitution to global industrial necessity, and its future development will depend on technological modernization, sustainability innovation, and adaptive responses to shifting industrial structures. As long as industries continue to demand durable, chemically resistant elastomers ? from medical gloves to industrial seals ? NBR will remain an essential material, evolving not only in performance but also in environmental and economic efficiency. The next decade of market development will likely focus on balancing traditional petrochemical-derived NBR with bio-based, recyclable, and high-performance variants that meet the emerging challenges of a sustainable, electrified, and technologically integrated global economy.

Global core nitrile butadiene rubber (NBR) manufacturers include ARLANXEO, CNPC etc. The top 5 companies hold a share about 50%.

This report studies the global Nitrile Butadiene Rubber (NBR) production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

U.S. VS China: Nitrile Butadiene Rubber (NBR) domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Nitrile Butadiene Rubber (NBR) 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 ARLANXEO, CNPC, Ningbo Shunze, Nantex, Kumho Petrochemical, JSR Corporation, LG Chem, Versalis S.P.A, Zeon Corporation, Sibur Holding, 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 Nitrile Butadiene Rubber (NBR) 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 Nitrile Butadiene Rubber (NBR) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Nitrile Butadiene Rubber (NBR) Market, Segmentation by Type:

Block Type

Particles/Crumb Type

Powder Type

Global Nitrile Butadiene Rubber (NBR) Market, Segmentation by Acrylonitrile (ACN)

Content:

Low ACN (18?25%) NBR

Medium ACN (26?35%) NBR

High ACN (36?50%) NBR

Global Nitrile Butadiene Rubber (NBR) Market, Segmentation by Polymerization and Production Process:

Hot Emulsion Polymerized NBR

Cold Emulsion Polymerized NBR

Specialty Grades

Global Nitrile Butadiene Rubber (NBR) Market, Segmentation by Application:

Automotive & Transportation

Construction Industry

Machinery Industry

Aprons & Cots Industry

Others

Companies Profiled:

ARLANXEO

CNPC

Ningbo Shunze

Nantex

Kumho Petrochemical

JSR Corporation

LG Chem

Versalis S.P.A

Zeon Corporation

Sibur Holding

Apcotex

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Nitrile Butadiene Rubber (NBR) Introduction
- 1.2 World Nitrile Butadiene Rubber (NBR) Supply & Forecast
 - 1.2.1 World Nitrile Butadiene Rubber (NBR) Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.2.3 World Nitrile Butadiene Rubber (NBR) Pricing Trends (2021-2032)
- 1.3 World Nitrile Butadiene Rubber (NBR) Production by Region (Based on Production Site)
 - 1.3.1 World Nitrile Butadiene Rubber (NBR) Production Value by Region (2021-2032)
 - 1.3.2 World Nitrile Butadiene Rubber (NBR) Production by Region (2021-2032)
 - 1.3.3 World Nitrile Butadiene Rubber (NBR) Average Price by Region (2021-2032)
 - 1.3.4 North America Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.3.5 Europe Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.3.6 China Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.3.7 Japan Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.3.8 China Taiwan Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.3.9 India Nitrile Butadiene Rubber (NBR) Production (2021-2032)
 - 1.3.10 South Korea Nitrile Butadiene Rubber (NBR) Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Nitrile Butadiene Rubber (NBR) Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Nitrile Butadiene Rubber (NBR) Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Nitrile Butadiene Rubber (NBR) Demand (2021-2032)
- 2.2 World Nitrile Butadiene Rubber (NBR) Consumption by Region
 - 2.2.1 World Nitrile Butadiene Rubber (NBR) Consumption by Region (2021-2026)
 - 2.2.2 World Nitrile Butadiene Rubber (NBR) Consumption Forecast by Region (2027-2032)
- 2.3 United States Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)
- 2.4 China Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)
- 2.5 Europe Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)
- 2.6 Japan Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)
- 2.7 South Korea Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)
- 2.8 ASEAN Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)

2.9 India Nitrile Butadiene Rubber (NBR) Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Nitrile Butadiene Rubber (NBR) Production Value by Manufacturer (2021-2026)

3.2 World Nitrile Butadiene Rubber (NBR) Production by Manufacturer (2021-2026)

3.3 World Nitrile Butadiene Rubber (NBR) Average Price by Manufacturer (2021-2026)

3.4 Nitrile Butadiene Rubber (NBR) Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Nitrile Butadiene Rubber (NBR) Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Nitrile Butadiene Rubber (NBR) in 2025

3.5.3 Global Concentration Ratios (CR8) for Nitrile Butadiene Rubber (NBR) in 2025

3.6 Nitrile Butadiene Rubber (NBR) Market: Overall Company Footprint Analysis

3.6.1 Nitrile Butadiene Rubber (NBR) Market: Region Footprint

3.6.2 Nitrile Butadiene Rubber (NBR) Market: Company Product Type Footprint

3.6.3 Nitrile Butadiene Rubber (NBR) Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Nitrile Butadiene Rubber (NBR) Production Value Comparison

4.1.1 United States VS China: Nitrile Butadiene Rubber (NBR) Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Nitrile Butadiene Rubber (NBR) Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Nitrile Butadiene Rubber (NBR) Production Comparison

4.2.1 United States VS China: Nitrile Butadiene Rubber (NBR) Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Nitrile Butadiene Rubber (NBR) Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Nitrile Butadiene Rubber (NBR) Consumption Comparison

4.3.1 United States VS China: Nitrile Butadiene Rubber (NBR) Consumption

Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Nitrile Butadiene Rubber (NBR) Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Nitrile Butadiene Rubber (NBR) Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Nitrile Butadiene Rubber (NBR) Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value (2021-2026)

4.4.3 United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production (2021-2026)

4.5 China Based Nitrile Butadiene Rubber (NBR) Manufacturers and Market Share

4.5.1 China Based Nitrile Butadiene Rubber (NBR) Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value (2021-2026)

4.5.3 China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production (2021-2026)

4.6 Rest of World Based Nitrile Butadiene Rubber (NBR) Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Nitrile Butadiene Rubber (NBR) Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Nitrile Butadiene Rubber (NBR) Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Block Type

5.2.2 Particles/Crumb Type

5.2.3 Powder Type

5.3 Market Segment by Type

5.3.1 World Nitrile Butadiene Rubber (NBR) Production by Type (2021-2032)

5.3.2 World Nitrile Butadiene Rubber (NBR) Production Value by Type (2021-2032)

5.3.3 World Nitrile Butadiene Rubber (NBR) Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY ACRYLONITRILE (ACN) CONTENT

6.1 World Nitrile Butadiene Rubber (NBR) Market Size Overview by Acrylonitrile (ACN) Content: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Acrylonitrile (ACN) Content

6.2.1 Low ACN (18?25%) NBR

6.2.2 Medium ACN (26?35%) NBR

6.2.3 High ACN (36?50%) NBR

6.3 Market Segment by Acrylonitrile (ACN) Content

6.3.1 World Nitrile Butadiene Rubber (NBR) Production by Acrylonitrile (ACN) Content (2021-2032)

6.3.2 World Nitrile Butadiene Rubber (NBR) Production Value by Acrylonitrile (ACN) Content (2021-2032)

6.3.3 World Nitrile Butadiene Rubber (NBR) Average Price by Acrylonitrile (ACN) Content (2021-2032)

7 MARKET ANALYSIS BY POLYMERIZATION AND PRODUCTION PROCESS

7.1 World Nitrile Butadiene Rubber (NBR) Market Size Overview by Polymerization and Production Process: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Polymerization and Production Process

7.2.1 Hot Emulsion Polymerized NBR

7.2.2 Cold Emulsion Polymerized NBR

7.2.3 Specialty Grades

7.3 Market Segment by Polymerization and Production Process

7.3.1 World Nitrile Butadiene Rubber (NBR) Production by Polymerization and Production Process (2021-2032)

7.3.2 World Nitrile Butadiene Rubber (NBR) Production Value by Polymerization and Production Process (2021-2032)

7.3.3 World Nitrile Butadiene Rubber (NBR) Average Price by Polymerization and Production Process (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Nitrile Butadiene Rubber (NBR) Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Automotive & Transportation

- 8.2.2 Construction Industry
- 8.2.3 Machinery Industry
- 8.2.4 Aprons & Cots Industry
- 8.2.5 Others

8.3 Market Segment by Application

- 8.3.1 World Nitrile Butadiene Rubber (NBR) Production by Application (2021-2032)
- 8.3.2 World Nitrile Butadiene Rubber (NBR) Production Value by Application (2021-2032)
- 8.3.3 World Nitrile Butadiene Rubber (NBR) Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 ARLANXEO

- 9.1.1 ARLANXEO Details
- 9.1.2 ARLANXEO Major Business
- 9.1.3 ARLANXEO Nitrile Butadiene Rubber (NBR) Product and Services
- 9.1.4 ARLANXEO Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 ARLANXEO Recent Developments/Updates
- 9.1.6 ARLANXEO Competitive Strengths & Weaknesses

9.2 CNPC

- 9.2.1 CNPC Details
- 9.2.2 CNPC Major Business
- 9.2.3 CNPC Nitrile Butadiene Rubber (NBR) Product and Services
- 9.2.4 CNPC Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 CNPC Recent Developments/Updates
- 9.2.6 CNPC Competitive Strengths & Weaknesses

9.3 Ningbo Shunze

- 9.3.1 Ningbo Shunze Details
- 9.3.2 Ningbo Shunze Major Business
- 9.3.3 Ningbo Shunze Nitrile Butadiene Rubber (NBR) Product and Services
- 9.3.4 Ningbo Shunze Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.3.5 Ningbo Shunze Recent Developments/Updates
- 9.3.6 Ningbo Shunze Competitive Strengths & Weaknesses

9.4 Nantex

- 9.4.1 Nantex Details
- 9.4.2 Nantex Major Business

- 9.4.3 Nantex Nitrile Butadiene Rubber (NBR) Product and Services
- 9.4.4 Nantex Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.4.5 Nantex Recent Developments/Updates
- 9.4.6 Nantex Competitive Strengths & Weaknesses
- 9.5 Kumho Petrochemical
 - 9.5.1 Kumho Petrochemical Details
 - 9.5.2 Kumho Petrochemical Major Business
 - 9.5.3 Kumho Petrochemical Nitrile Butadiene Rubber (NBR) Product and Services
 - 9.5.4 Kumho Petrochemical Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Kumho Petrochemical Recent Developments/Updates
 - 9.5.6 Kumho Petrochemical Competitive Strengths & Weaknesses
- 9.6 JSR Corporation
 - 9.6.1 JSR Corporation Details
 - 9.6.2 JSR Corporation Major Business
 - 9.6.3 JSR Corporation Nitrile Butadiene Rubber (NBR) Product and Services
 - 9.6.4 JSR Corporation Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 JSR Corporation Recent Developments/Updates
 - 9.6.6 JSR Corporation Competitive Strengths & Weaknesses
- 9.7 LG Chem
 - 9.7.1 LG Chem Details
 - 9.7.2 LG Chem Major Business
 - 9.7.3 LG Chem Nitrile Butadiene Rubber (NBR) Product and Services
 - 9.7.4 LG Chem Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 LG Chem Recent Developments/Updates
 - 9.7.6 LG Chem Competitive Strengths & Weaknesses
- 9.8 Versalis S.P.A
 - 9.8.1 Versalis S.P.A Details
 - 9.8.2 Versalis S.P.A Major Business
 - 9.8.3 Versalis S.P.A Nitrile Butadiene Rubber (NBR) Product and Services
 - 9.8.4 Versalis S.P.A Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 Versalis S.P.A Recent Developments/Updates
 - 9.8.6 Versalis S.P.A Competitive Strengths & Weaknesses
- 9.9 Zeon Corporation
 - 9.9.1 Zeon Corporation Details

- 9.9.2 Zeon Corporation Major Business
- 9.9.3 Zeon Corporation Nitrile Butadiene Rubber (NBR) Product and Services
- 9.9.4 Zeon Corporation Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.9.5 Zeon Corporation Recent Developments/Updates
- 9.9.6 Zeon Corporation Competitive Strengths & Weaknesses
- 9.10 Sibur Holding
 - 9.10.1 Sibur Holding Details
 - 9.10.2 Sibur Holding Major Business
 - 9.10.3 Sibur Holding Nitrile Butadiene Rubber (NBR) Product and Services
 - 9.10.4 Sibur Holding Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Sibur Holding Recent Developments/Updates
 - 9.10.6 Sibur Holding Competitive Strengths & Weaknesses
- 9.11 Apcotex
 - 9.11.1 Apcotex Details
 - 9.11.2 Apcotex Major Business
 - 9.11.3 Apcotex Nitrile Butadiene Rubber (NBR) Product and Services
 - 9.11.4 Apcotex Nitrile Butadiene Rubber (NBR) Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Apcotex Recent Developments/Updates
 - 9.11.6 Apcotex Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Nitrile Butadiene Rubber (NBR) Industry Chain
- 10.2 Nitrile Butadiene Rubber (NBR) Upstream Analysis
 - 10.2.1 Nitrile Butadiene Rubber (NBR) Core Raw Materials
 - 10.2.2 Main Manufacturers of Nitrile Butadiene Rubber (NBR) Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Nitrile Butadiene Rubber (NBR) Production Mode
- 10.6 Nitrile Butadiene Rubber (NBR) Procurement Model
- 10.7 Nitrile Butadiene Rubber (NBR) Industry Sales Model and Sales Channels
 - 10.7.1 Nitrile Butadiene Rubber (NBR) Sales Model
 - 10.7.2 Nitrile Butadiene Rubber (NBR) Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Figures

LIST OF FIGURES

Table 1. World Nitrile Butadiene Rubber (NBR) Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Nitrile Butadiene Rubber (NBR) Production Value by Region (2021-2026) & (USD Million)

Table 3. World Nitrile Butadiene Rubber (NBR) Production Value by Region (2027-2032) & (USD Million)

Table 4. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Region (2021-2026)

Table 5. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Region (2027-2032)

Table 6. World Nitrile Butadiene Rubber (NBR) Production by Region (2021-2026) & (K MT)

Table 7. World Nitrile Butadiene Rubber (NBR) Production by Region (2027-2032) & (K MT)

Table 8. World Nitrile Butadiene Rubber (NBR) Production Market Share by Region (2021-2026)

Table 9. World Nitrile Butadiene Rubber (NBR) Production Market Share by Region (2027-2032)

Table 10. World Nitrile Butadiene Rubber (NBR) Average Price by Region (2021-2026) & (USD/MT)

Table 11. World Nitrile Butadiene Rubber (NBR) Average Price by Region (2027-2032) & (USD/MT)

Table 12. Nitrile Butadiene Rubber (NBR) Major Market Trends

Table 13. World Nitrile Butadiene Rubber (NBR) Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K MT)

Table 14. World Nitrile Butadiene Rubber (NBR) Consumption by Region (2021-2026) & (K MT)

Table 15. World Nitrile Butadiene Rubber (NBR) Consumption Forecast by Region (2027-2032) & (K MT)

Table 16. World Nitrile Butadiene Rubber (NBR) Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Nitrile Butadiene Rubber (NBR) Producers in 2025

Table 18. World Nitrile Butadiene Rubber (NBR) Production by Manufacturer (2021-2026) & (K MT)

Table 19. Production Market Share of Key Nitrile Butadiene Rubber (NBR) Producers in 2025

Table 20. World Nitrile Butadiene Rubber (NBR) Average Price by Manufacturer (2021-2026) & (USD/MT)

Table 21. Global Nitrile Butadiene Rubber (NBR) Company Evaluation Quadrant

Table 22. World Nitrile Butadiene Rubber (NBR) Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Nitrile Butadiene Rubber (NBR) Production Site of Key Manufacturer

Table 24. Nitrile Butadiene Rubber (NBR) Market: Company Product Type Footprint

Table 25. Nitrile Butadiene Rubber (NBR) Market: Company Product Application Footprint

Table 26. Nitrile Butadiene Rubber (NBR) Competitive Factors

Table 27. Nitrile Butadiene Rubber (NBR) New Entrant and Capacity Expansion Plans

Table 28. Nitrile Butadiene Rubber (NBR) Mergers & Acquisitions Activity

Table 29. United States VS China Nitrile Butadiene Rubber (NBR) Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Nitrile Butadiene Rubber (NBR) Production Comparison, (2021 & 2025 & 2032) & (K MT)

Table 31. United States VS China Nitrile Butadiene Rubber (NBR) Consumption Comparison, (2021 & 2025 & 2032) & (K MT)

Table 32. United States Based Nitrile Butadiene Rubber (NBR) Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production (2021-2026) & (K MT)

Table 36. United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Market Share (2021-2026)

Table 37. China Based Nitrile Butadiene Rubber (NBR) Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production, (2021-2026) & (K MT)

Table 41. China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Market Share (2021-2026)

Table 42. Rest of World Based Nitrile Butadiene Rubber (NBR) Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production, (2021-2026) & (K MT)

Table 46. Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Market Share (2021-2026)

Table 47. World Nitrile Butadiene Rubber (NBR) Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Nitrile Butadiene Rubber (NBR) Production by Type (2021-2026) & (K MT)

Table 49. World Nitrile Butadiene Rubber (NBR) Production by Type (2027-2032) & (K MT)

Table 50. World Nitrile Butadiene Rubber (NBR) Production Value by Type (2021-2026) & (USD Million)

Table 51. World Nitrile Butadiene Rubber (NBR) Production Value by Type (2027-2032) & (USD Million)

Table 52. World Nitrile Butadiene Rubber (NBR) Average Price by Type (2021-2026) & (USD/MT)

Table 53. World Nitrile Butadiene Rubber (NBR) Average Price by Type (2027-2032) & (USD/MT)

Table 54. World Nitrile Butadiene Rubber (NBR) Production Value by Acrylonitrile (ACN) Content, (USD Million), 2021 & 2025 & 2032

Table 55. World Nitrile Butadiene Rubber (NBR) Production by Acrylonitrile (ACN) Content (2021-2026) & (K MT)

Table 56. World Nitrile Butadiene Rubber (NBR) Production by Acrylonitrile (ACN) Content (2027-2032) & (K MT)

Table 57. World Nitrile Butadiene Rubber (NBR) Production Value by Acrylonitrile (ACN) Content (2021-2026) & (USD Million)

Table 58. World Nitrile Butadiene Rubber (NBR) Production Value by Acrylonitrile (ACN) Content (2027-2032) & (USD Million)

Table 59. World Nitrile Butadiene Rubber (NBR) Average Price by Acrylonitrile (ACN) Content (2021-2026) & (USD/MT)

Table 60. World Nitrile Butadiene Rubber (NBR) Average Price by Acrylonitrile (ACN)

Content (2027-2032) & (USD/MT)

Table 61. World Nitrile Butadiene Rubber (NBR) Production Value by Polymerization and Production Process, (USD Million), 2021 & 2025 & 2032

Table 62. World Nitrile Butadiene Rubber (NBR) Production by Polymerization and Production Process (2021-2026) & (K MT)

Table 63. World Nitrile Butadiene Rubber (NBR) Production by Polymerization and Production Process (2027-2032) & (K MT)

Table 64. World Nitrile Butadiene Rubber (NBR) Production Value by Polymerization and Production Process (2021-2026) & (USD Million)

Table 65. World Nitrile Butadiene Rubber (NBR) Production Value by Polymerization and Production Process (2027-2032) & (USD Million)

Table 66. World Nitrile Butadiene Rubber (NBR) Average Price by Polymerization and Production Process (2021-2026) & (USD/MT)

Table 67. World Nitrile Butadiene Rubber (NBR) Average Price by Polymerization and Production Process (2027-2032) & (USD/MT)

Table 68. World Nitrile Butadiene Rubber (NBR) Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Nitrile Butadiene Rubber (NBR) Production by Application (2021-2026) & (K MT)

Table 70. World Nitrile Butadiene Rubber (NBR) Production by Application (2027-2032) & (K MT)

Table 71. World Nitrile Butadiene Rubber (NBR) Production Value by Application (2021-2026) & (USD Million)

Table 72. World Nitrile Butadiene Rubber (NBR) Production Value by Application (2027-2032) & (USD Million)

Table 73. World Nitrile Butadiene Rubber (NBR) Average Price by Application (2021-2026) & (USD/MT)

Table 74. World Nitrile Butadiene Rubber (NBR) Average Price by Application (2027-2032) & (USD/MT)

Table 75. ARLANXEO Basic Information, Manufacturing Base and Competitors

Table 76. ARLANXEO Major Business

Table 77. ARLANXEO Nitrile Butadiene Rubber (NBR) Product and Services

Table 78. ARLANXEO Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. ARLANXEO Recent Developments/Updates

Table 80. ARLANXEO Competitive Strengths & Weaknesses

Table 81. CNPC Basic Information, Manufacturing Base and Competitors

Table 82. CNPC Major Business

- Table 83. CNPC Nitrile Butadiene Rubber (NBR) Product and Services
- Table 84. CNPC Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. CNPC Recent Developments/Updates
- Table 86. CNPC Competitive Strengths & Weaknesses
- Table 87. Ningbo Shunze Basic Information, Manufacturing Base and Competitors
- Table 88. Ningbo Shunze Major Business
- Table 89. Ningbo Shunze Nitrile Butadiene Rubber (NBR) Product and Services
- Table 90. Ningbo Shunze Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Ningbo Shunze Recent Developments/Updates
- Table 92. Ningbo Shunze Competitive Strengths & Weaknesses
- Table 93. Nantex Basic Information, Manufacturing Base and Competitors
- Table 94. Nantex Major Business
- Table 95. Nantex Nitrile Butadiene Rubber (NBR) Product and Services
- Table 96. Nantex Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Nantex Recent Developments/Updates
- Table 98. Nantex Competitive Strengths & Weaknesses
- Table 99. Kumho Petrochemical Basic Information, Manufacturing Base and Competitors
- Table 100. Kumho Petrochemical Major Business
- Table 101. Kumho Petrochemical Nitrile Butadiene Rubber (NBR) Product and Services
- Table 102. Kumho Petrochemical Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Kumho Petrochemical Recent Developments/Updates
- Table 104. Kumho Petrochemical Competitive Strengths & Weaknesses
- Table 105. JSR Corporation Basic Information, Manufacturing Base and Competitors
- Table 106. JSR Corporation Major Business
- Table 107. JSR Corporation Nitrile Butadiene Rubber (NBR) Product and Services
- Table 108. JSR Corporation Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. JSR Corporation Recent Developments/Updates
- Table 110. JSR Corporation Competitive Strengths & Weaknesses
- Table 111. LG Chem Basic Information, Manufacturing Base and Competitors
- Table 112. LG Chem Major Business

- Table 113. LG Chem Nitrile Butadiene Rubber (NBR) Product and Services
- Table 114. LG Chem Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. LG Chem Recent Developments/Updates
- Table 116. LG Chem Competitive Strengths & Weaknesses
- Table 117. Versalis S.P.A Basic Information, Manufacturing Base and Competitors
- Table 118. Versalis S.P.A Major Business
- Table 119. Versalis S.P.A Nitrile Butadiene Rubber (NBR) Product and Services
- Table 120. Versalis S.P.A Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. Versalis S.P.A Recent Developments/Updates
- Table 122. Versalis S.P.A Competitive Strengths & Weaknesses
- Table 123. Zeon Corporation Basic Information, Manufacturing Base and Competitors
- Table 124. Zeon Corporation Major Business
- Table 125. Zeon Corporation Nitrile Butadiene Rubber (NBR) Product and Services
- Table 126. Zeon Corporation Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 127. Zeon Corporation Recent Developments/Updates
- Table 128. Zeon Corporation Competitive Strengths & Weaknesses
- Table 129. Sibur Holding Basic Information, Manufacturing Base and Competitors
- Table 130. Sibur Holding Major Business
- Table 131. Sibur Holding Nitrile Butadiene Rubber (NBR) Product and Services
- Table 132. Sibur Holding Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 133. Sibur Holding Recent Developments/Updates
- Table 134. Sibur Holding Competitive Strengths & Weaknesses
- Table 135. Apcotex Basic Information, Manufacturing Base and Competitors
- Table 136. Apcotex Major Business
- Table 137. Apcotex Nitrile Butadiene Rubber (NBR) Product and Services
- Table 138. Apcotex Nitrile Butadiene Rubber (NBR) Production (K MT), Price (USD/MT), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 139. Apcotex Recent Developments/Updates
- Table 140. Apcotex Competitive Strengths & Weaknesses
- Table 141. Global Key Players of Nitrile Butadiene Rubber (NBR) Upstream (Raw

Materials)

Table 142. Global Nitrile Butadiene Rubber (NBR) Typical Customers

Table 143. Nitrile Butadiene Rubber (NBR) Typical Distributors

LIST OF FIGURES

Figure 1. Nitrile Butadiene Rubber (NBR) Picture

Figure 2. World Nitrile Butadiene Rubber (NBR) Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Nitrile Butadiene Rubber (NBR) Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 5. World Nitrile Butadiene Rubber (NBR) Average Price (2021-2032) & (USD/MT)

Figure 6. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Region (2021-2032)

Figure 7. World Nitrile Butadiene Rubber (NBR) Production Market Share by Region (2021-2032)

Figure 8. North America Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 9. Europe Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 10. China Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 11. Japan Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 12. China Taiwan Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 13. India Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 14. South Korea Nitrile Butadiene Rubber (NBR) Production (2021-2032) & (K MT)

Figure 15. Nitrile Butadiene Rubber (NBR) Market Drivers

Figure 16. Factors Affecting Demand

Figure 17. World Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 18. World Nitrile Butadiene Rubber (NBR) Consumption Market Share by Region (2021-2032)

Figure 19. United States Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 20. China Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 21. Europe Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 22. Japan Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 23. South Korea Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K

MT)

Figure 24. ASEAN Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 25. India Nitrile Butadiene Rubber (NBR) Consumption (2021-2032) & (K MT)

Figure 26. Producer Shipments of Nitrile Butadiene Rubber (NBR) by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 27. Global Four-firm Concentration Ratios (CR4) for Nitrile Butadiene Rubber (NBR) Markets in 2025

Figure 28. Global Four-firm Concentration Ratios (CR8) for Nitrile Butadiene Rubber (NBR) Markets in 2025

Figure 29. United States VS China: Nitrile Butadiene Rubber (NBR) Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Nitrile Butadiene Rubber (NBR) Production Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States VS China: Nitrile Butadiene Rubber (NBR) Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 32. United States Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Market Share 2025

Figure 33. China Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Market Share 2025

Figure 34. Rest of World Based Manufacturers Nitrile Butadiene Rubber (NBR) Production Market Share 2025

Figure 35. World Nitrile Butadiene Rubber (NBR) Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 36. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Type in 2025

Figure 37. Block Type

Figure 38. Particles/Crumb Type

Figure 39. Powder Type

Figure 40. World Nitrile Butadiene Rubber (NBR) Production Market Share by Type (2021-2032)

Figure 41. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Type (2021-2032)

Figure 42. World Nitrile Butadiene Rubber (NBR) Average Price by Type (2021-2032) & (USD/MT)

Figure 43. World Nitrile Butadiene Rubber (NBR) Production Value by Acrylonitrile (ACN) Content, (USD Million), 2021 & 2025 & 2032

Figure 44. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Acrylonitrile (ACN) Content in 2025

Figure 45. Low ACN (18?25%) NBR

- Figure 46. Medium ACN (26?35%) NBR
- Figure 47. High ACN (36?50%) NBR
- Figure 48. World Nitrile Butadiene Rubber (NBR) Production Market Share by Acrylonitrile (ACN) Content (2021-2032)
- Figure 49. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Acrylonitrile (ACN) Content (2021-2032)
- Figure 50. World Nitrile Butadiene Rubber (NBR) Average Price by Acrylonitrile (ACN) Content (2021-2032) & (USD/MT)
- Figure 51. World Nitrile Butadiene Rubber (NBR) Production Value by Polymerization and Production Process, (USD Million), 2021 & 2025 & 2032
- Figure 52. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Polymerization and Production Process in 2025
- Figure 53. Hot Emulsion Polymerized NBR
- Figure 54. Cold Emulsion Polymerized NBR
- Figure 55. Specialty Grades
- Figure 56. World Nitrile Butadiene Rubber (NBR) Production Market Share by Polymerization and Production Process (2021-2032)
- Figure 57. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Polymerization and Production Process (2021-2032)
- Figure 58. World Nitrile Butadiene Rubber (NBR) Average Price by Polymerization and Production Process (2021-2032) & (USD/MT)
- Figure 59. World Nitrile Butadiene Rubber (NBR) Production Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 60. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Application in 2025
- Figure 61. Automotive & Transportation
- Figure 62. Construction Industry
- Figure 63. Machinery Industry
- Figure 64. Aprons & Cots Industry
- Figure 65. Others
- Figure 66. World Nitrile Butadiene Rubber (NBR) Production Market Share by Application (2021-2032)
- Figure 67. World Nitrile Butadiene Rubber (NBR) Production Value Market Share by Application (2021-2032)
- Figure 68. World Nitrile Butadiene Rubber (NBR) Average Price by Application (2021-2032) & (USD/MT)
- Figure 69. Nitrile Butadiene Rubber (NBR) Industry Chain
- Figure 70. Nitrile Butadiene Rubber (NBR) Procurement Model
- Figure 71. Nitrile Butadiene Rubber (NBR) Sales Model

Figure 72. Nitrile Butadiene Rubber (NBR) Sales Channels, Direct Sales, and Distribution

Figure 73. Methodology

Figure 74. Research Process and Data Source

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