

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

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Abstracts

The global Polybutadiene Latex market size is expected to reach \$ 5369 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

Polybutadiene latex, commonly abbreviated as PBL, 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, polybutadiene 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.

Global production increased to 3,445.5 kilotons in 2025 and is projected to reach 4,586.7 kilotons by 2032. The market expansion is mainly supported by continued ABS resin production growth, higher requirements for impact modification, and the upgrading of rubber-phase control in styrenic resin systems.

The competitive landscape is led by integrated ABS and styrenic resin producers. Major manufacturers listed in the report include ZEON, LG Chem, CHIMEI, Formosa Chemicals & Fibre, Kingfa, Tianjin Dagu Chemical, PetroChina, LOTTE Chemical and Grand Pacific Petrochemical. In 2025, the top three vendors accounted for approximately 46.92% of global revenue, indicating a moderately concentrated supplier

structure. The leading companies are not only PBL producers but also downstream ABS or impact-modifier producers, which means a large portion of PBL output is consumed internally as a rubber-phase intermediate rather than sold as an open-market commodity.

The primary driver is the expansion of ABS resin production, especially in Asia. Growth in household appliances, automotive parts, electrical and electronic housings, office equipment, toys and consumer goods supports steady ABS demand and increases captive PBL consumption. A second driver is the shift toward high-rubber graft powder, high-impact ABS, electroplating ABS, low-gloss ABS, heat-resistant ABS and automotive ABS grades, all of which require more controlled rubber-particle morphology and more stable latex quality. Additional drivers include regional supply-chain localization, increasing impact-resistance requirements in automotive and electronics, development of MBS and core-shell modifier systems, and the advantages of petrochemical integration and butadiene feedstock security.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

Global Polybutadiene Latex production by Application, production, value, CAGR,

2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Polybutadiene 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, Kingfa, Tianjin Dagu Chemical, CNPC, LOTTE Chemical, Grand Pacific Petrochemical, 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 Polybutadiene 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 Polybutadiene Latex Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Polybutadiene Latex Market, Segmentation by Type:

Standard Wet Polybutadiene Latex

Agglomerated Polybutadiene Latex

Graft-ready grade Polybutadiene Latex

Others

Global Polybutadiene Latex Market, Segmentation by Solid Content:

Low-solids Polybutadiene Latex

Standard-solids Polybutadiene Latex

High-solids and Concentrated Polybutadiene Latex

Global Polybutadiene Latex Market, Segmentation by Particle:

Small-particle Polybutadiene Latex

Large-particle Polybutadiene Latex

Others

Global Polybutadiene Latex Market, Segmentation by Application:

ABS Resin

MBS Impact Modifier

Others

Companies Profiled:

ZEON

LG Chem

CHIMEI

Formosa Chemicals & Fibre

Kingfa

Tianjin Dagu Chemical

CNPC

LOTTE Chemical

Grand Pacific Petrochemical

Key Questions Answered:

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

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