

# Global Reactive Toughener for Epoxy Resin Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Reactive Toughener for Epoxy Resin market size is expected to reach \$ 228 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of reactive tougheners for epoxy resins reached 18,000 metric tons, with an average price of \$8,635 per metric ton.

Tougheners for epoxy resin can be divided into two categories: reactive and non-reactive tougheners. Reactive toughening agents refer to polyamide resins containing unsaturated bonds and amide groups. Liquid polysulfide compounds, polyazelaic anhydride, etc. have both toughening and curing effects. Reactive toughening agents refer to common plasticizers, such as DOP, DBP, TCP, TPP, etc., because they are not very compatible with epoxy resins, so the amount should not be too much.

The raw material systems for reactive tougheners used in epoxy resins fall into four main categories: rubber matrix materials, functional monomers, end-capping agents, and auxiliary agents. Regarding rubber matrix materials, the core components are butadiene and acrylonitrile monomers; these are used to produce nitrile rubber (NBR) prepolymers via free-radical emulsion or solution polymerization. Butadiene provides rubbery elasticity and a low glass transition temperature (T<sub>g</sub>), while acrylonitrile imparts polarity and compatibility with the epoxy resin. The ratio of these two components directly determines the toughener's compatibility and phase separation behavior; products are categorized into series based on ACN content ranging from 0% to 26% (e.g., 1300?8 contains 18% ACN, while 1300?13 contains 26% ACN). End-capping agents are crucial for imparting reactive functionality to the rubber: CTBN synthesis requires carboxyl-group initiators or end-capping agents (such as thioglycolic acid);

ATBN is produced by reacting CTBN with amine compounds (such as aminoethylpiperazine, or AEP); ETBN is modified via epichlorohydrin or glycidyl esters; and VTBN is modified using vinylating agents. Functional monomers include methyl methacrylate (MMA) and butyl acrylate (BA), which are used for core-shell structures. The auxiliary agent system encompasses emulsifiers, initiators (peroxides), chain transfer agents, stabilizers, and antioxidants.

In terms of cost structure, the production cost of reactive tougheners consists of three main components: raw materials, the synthesis process, and purification/packaging. Raw material costs account for 50?65% of the total cost. As major petrochemical products, fluctuations in the prices of butadiene (approx. US\$1,000?1,500/ton) and acrylonitrile (approx. US\$1,500?2,000/ton) directly impact the cost of toughening agents; additionally, price volatility in natural rubber and elastomer feedstocks exerts a negative impact of -1.4% on the CAGR. End-capping agents and functional monomers account for 15?25% of raw material costs. Synthesis process costs?comprising energy consumption for emulsion or solution polymerization, equipment depreciation, labor, and quality control?account for approximately 20?30% of the total. Core-shell toughening agents involve complex multi-step emulsion polymerization (synthesizing the core first, followed by shell encapsulation), resulting in significantly higher process complexity and costs compared to traditional liquid rubbers. Purification and packaging costs account for about 10?15%, covering devolatilization, filtration, drying, testing, and specialized packaging (light-shielding, oxygen-barrier, and low-temperature storage). Furthermore, the U.S. Superfund excise tax imposes additional levies on acrylonitrile-butadiene rubber, increasing the cost of locally formulated products in North America (impacting CAGR by approximately -1.1%), while EU regulations regarding BPA and SVHCs necessitate product reformulation, thereby increasing R&D costs and extending time-to-market.

This report studies the global Reactive Toughener for Epoxy Resin production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Reactive Toughener for Epoxy Resin total production and demand, 2021-2032,

(Tons)

Global Reactive Toughener for Epoxy Resin total production value, 2021-2032, (USD Million)

Global Reactive Toughener for Epoxy Resin production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Reactive Toughener for Epoxy Resin consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Reactive Toughener for Epoxy Resin domestic production, consumption, key domestic manufacturers and share

Global Reactive Toughener for Epoxy Resin production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Reactive Toughener for Epoxy Resin production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Reactive Toughener for Epoxy Resin production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Reactive Toughener for Epoxy Resin 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 Kaneka (JP), Solvay (BE), Huntsman (US), Wenzhou Qingming Chemical Co., Ltd. (CN), Hangzhou Jingyi Polymer Materials Co., Ltd. (CN), Baling Huaxing Petrochemical (CN), Taizhou Hengchuang Insulation Materials (CN), Jindao Qishi (CN), 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 Reactive Toughener for Epoxy Resin 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 Reactive Toughener for Epoxy Resin Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Reactive Toughener for Epoxy Resin Market, Segmentation by Type:

Rubber Type

Thermoplastic Elastomer Type

Others

Global Reactive Toughener for Epoxy Resin Market, Segmentation by Structural Form:

Liquid Rubber Type

Core-shell Structure Type

Nano-rubber Type

Global Reactive Toughener for Epoxy Resin Market, Segmentation by Terminal Functional Groups:

CTBN (Carboxyl-Terminated Butadiene-Nitrile Rubber)

ATBN (Amine-Terminated Butadiene-Nitrile Rubber)

HTBN (Hydroxyl-Terminated Butadiene-Nitrile Rubber)

ETBN (Epoxy-Terminated Butadiene-Nitrile Rubber)

VTBN (Vinyl-Terminated Butadiene-Nitrile Rubber)

Other

Global Reactive Toughener for Epoxy Resin Market, Segmentation by Application:

Coating

Adhesive

Electronics

Composite Materials

Others

Companies Profiled:

Kaneka (JP)

Solvay (BE)

Huntsman (US)

Wenzhou Qingming Chemical Co., Ltd. (CN)

Hangzhou Jingyi Polymer Materials Co., Ltd. (CN)

Baling Huaxing Petrochemical (CN)

Taizhou Hengchuang Insulation Materials (CN)

Jindao Qishi (CN)

Key Questions Answered:

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

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