

Global Solid Propellant Binders 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 Solid Propellant Binders market size was valued at US\$ 94.66 million in 2025 and is forecast to a readjusted size of US\$ 159 million by 2032 with a CAGR of 7.3% during review period.

Solid propellant binders are specialized polymeric matrix materials used in solid rocket propellants and energetic propulsion systems, primarily including hydroxyl terminated polybutadiene, energetic binders, carboxyl terminated polybutadiene, and energetic thermoplastic elastomers. These materials are typically supplied in the form of liquid prepolymers, polymer resins, or energetic polymer systems. Their primary function is to bind oxidizers, metallic fuels, and functional additives into a mechanically stable propellant grain while providing structural integrity, low temperature toughness, aging resistance, combustion stability, and processability. Manufacturing processes generally involve anionic polymerization, free radical polymerization, end group modification, prepolymer synthesis, vacuum devolatilization, and precision formulation control. Key specifications include hydroxyl value, molecular weight distribution, viscosity, energetic functional group content, crosslink density, and impurity control capability. Major applications include tactical missiles, strategic missile systems, launch vehicles, rocket assisted systems, and aerospace propulsion platforms. In 2025, the pricing structure of solid propellant binders varied significantly depending on product grade, technical complexity, and end-use applications. Industrial grade hydroxyl terminated polybutadiene was typically priced at approximately USD 5,000 to USD 12,000 per ton, while propulsion grade hydroxyl terminated polybutadiene commanded substantially higher prices of approximately USD 20,000 to USD 40,000 per ton due to stringent requirements for purity, hydroxyl value control, metallic impurity management, and batch-to-batch consistency. Energetic binders such as glycidyl azide polymer were

considerably more expensive because of their complex synthesis routes, limited production scale, and application in advanced high energy propulsion systems, with prices commonly reaching approximately USD 50,000 to USD 150,000 per ton or higher. Owing to strict qualification procedures, supplier access barriers, and long-term reliability requirements in military and aerospace propulsion applications, the average industry gross margin was estimated at approximately 35% to 50%, significantly higher than that of conventional industrial liquid polybutadiene products.

Solid propellant binders represent a highly specialized military and aerospace materials segment characterized by small shipment volumes, high technical barriers, and stringent reliability requirements. Upstream supply mainly involves butadiene derivatives, specialty monomers, energetic chemicals, and high purity polymer feedstocks, while midstream activities focus on propulsion grade polymer synthesis, energetic binder manufacturing, and specialty liquid rubber production. Downstream demand is concentrated in solid rocket motors, missile propulsion systems, launch vehicles, and aerospace propulsion platforms. The global supplier base remains relatively limited and is dominated by companies with long term military qualification capabilities, advanced polymerization know how, and stable aerospace supply chain relationships, resulting in a market structure that differs significantly from conventional industrial polymer sectors.

The market environment has been increasingly supported by missile replenishment programs, defense modernization initiatives, and rising commercial space activity. Multiple countries are accelerating localization strategies for critical propulsion materials, leading to regional capacity expansion, supply chain restructuring, and higher strategic investment in propulsion related chemical systems. Hydroxyl terminated polybutadiene remains the dominant mainstream binder system due to its mature engineering performance and established qualification history. At the same time, energetic binders and energetic thermoplastic elastomers are attracting growing attention in advanced propulsion systems that require higher energy density, reduced signatures, and improved tactical performance, although their adoption remains constrained by cost, mechanical property balance, and long certification cycles.

Competitive concentration remains relatively high because only a limited number of suppliers possess the capability to provide propulsion grade polymer systems with consistent batch stability and long term reliability. Internal military supply chains and region specific supporting systems continue to play an important role in overall market supply. The industry maintains relatively stable pricing characteristics and exhibits limited exposure to consumer electronics and conventional commodity chemical cycles.

Future growth is expected to be driven primarily by defense expenditure, launch activity growth, propulsion system upgrades, and the industrialization of next generation energetic material systems, supporting a long term outlook of stable expansion combined with persistent technological barriers.

This report is a detailed and comprehensive analysis for global Solid Propellant Binders market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Chemistry 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 Solid Propellant Binders market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

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

Global Solid Propellant Binders market size and forecasts, by Product Chemistry and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Solid Propellant Binders 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 Solid Propellant Binders

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 Solid Propellant Binders 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 Samyang Fine Chemical Co., Ltd., Evonik Industries AG, Tianyuan New Materials, Cray Valley, Orion Chem Pvt. Ltd., NOF Corporation, Eurenco, Idemitsu Kosan Co., Ltd., Resin Solutions LLC, Liming Research Institute of Chemical Industry, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Solid Propellant Binders market is split by Product Chemistry and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Chemistry, 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 Product Chemistry

Hydroxyl Terminated Polybutadiene HTPB

Glycidyl Azide Polymer GAP

Carboxyl Terminated Polybutadiene CTPB

Polybutadiene Acrylonitrile PBAN

Others

Market segment by Energy Property

Inert Binder

Energetic Binder

Others

Market segment by Curing System

- Thermoset Binder
- Thermoplastic Binder
- Hybrid Binder System
- Others

Market segment by Viscosity

- Low Viscosity Binder (20 Pa·s)

Market segment by Application

- Tactical Missiles
- Strategic Missiles
- Space Launch Vehicles
- Rocket Artillery
- Others

Major players covered

- Samyang Fine Chemical Co., Ltd.
- Evonik Industries AG
- Tianyuan New Materials

Cray Valley

Orion Chem Pvt. Ltd.

NOF Corporation

Eurengo

Idemitsu Kosan Co., Ltd.

Resin Solutions LLC

Liming Research Institute of Chemical Industry

42 Institute of the Fourth Academy of CASC

Helicon Chemical Company LLC

Zibo Qilong Chemical Industry Co., Ltd.

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 Solid Propellant Binders product scope, market overview, market estimation caveats and base year.

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

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

Chapter 4, the Solid Propellant Binders 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 Product Chemistry and by Application, with sales market share and growth rate by Product Chemistry, 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 Solid Propellant Binders market forecast, by regions, by Product Chemistry, 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 Solid Propellant Binders.

Chapter 14 and 15, to describe Solid Propellant Binders sales channel, distributors, customers, research findings and conclusion.

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