

Global Solid Propellant Binders Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Solid Propellant Binders market size is expected to reach \$ 159 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

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 studies the global Solid Propellant Binders production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Solid Propellant Binders total production and demand, 2021-2032, (Tons)

Global Solid Propellant Binders total production value, 2021-2032, (USD Million)

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

Global Solid Propellant Binders consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Solid Propellant Binders domestic production, consumption, key domestic manufacturers and share

Global Solid Propellant Binders production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Solid Propellant Binders production by Product Chemistry, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Solid Propellant Binders production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Solid Propellant Binders 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Solid Propellant Binders 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 Product Chemistry, 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 Solid Propellant Binders Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Solid Propellant Binders Market, Segmentation by Product Chemistry:

Hydroxyl Terminated Polybutadiene HTPB

Glycidyl Azide Polymer GAP

Carboxyl Terminated Polybutadiene CTPB

Polybutadiene Acrylonitrile PBAN

Others

Global Solid Propellant Binders Market, Segmentation by Energy Property:

Inert Binder

Energetic Binder

Others

Global Solid Propellant Binders Market, Segmentation by Curing System:

Thermoset Binder

Thermoplastic Binder

Hybrid Binder System

Others

Global Solid Propellant Binders Market, Segmentation by Viscosity:

Low Viscosity Binder (20 Pa?s)

Global Solid Propellant Binders Market, Segmentation by Application:

Tactical Missiles

Strategic Missiles

Space Launch Vehicles

Rocket Artillery

Others

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Solid Propellant Binders market?
2. What is the demand of the global Solid Propellant Binders market?
3. What is the year over year growth of the global Solid Propellant Binders market?
4. What is the production and production value of the global Solid Propellant Binders market?
5. Who are the key producers in the global Solid Propellant Binders market?

6. What are the growth factors driving the market demand?

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