

Global Tert-Dodecyl Mercaptan Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tert-Dodecyl Mercaptan market size is expected to reach \$ 365 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032). Tert-Dodecyl Mercaptan (TDM) is colorless oil liquid, and diffuses foul smell. It is insoluble in water, soluble in alcohol, ether, acetone, benzene, gasoline and other organic solvents and esters. It is mainly used as molecular weight modifier. In 2024, global Tert-Dodecyl Mercaptan production reached approximately 119 K MT, with an average global market price of around US\$ 2489 per MT.

Tert-dodecyl mercaptan (t-DDM or TDM) demand is primarily driven by its role as a chain-transfer agent used to control molecular weight, branching, and rheology in free-radical polymerization, especially in synthetic rubber/latex and acrylic/vinyl emulsion polymers used for coatings, adhesives, sealants, inks, paper/package treatments, and specialty elastomer applications. Because it is often specified by formulation and process qualification, consumption is closely tied to the health of downstream construction and renovation (architectural coatings, sealants), automotive and tire production (rubber demand), and broader growth in waterborne polymer systems; it can also benefit from regulatory and performance trends that favor low-VOC water-based formulations where emulsion polymerization and tight molecular-weight control are important.

Upstream, t-DDM sits on a C12 hydrocarbon + sulfur supply base and is more specialty than linear mercaptans because the feedstocks and production route commonly involve creating a branched C12 olefin (often via oligomerization or isomerization pathways) and then introducing sulfur functionality (frequently through reactions using hydrogen sulfide or sulfur-derived reagents) followed by careful purification and odor-controlled handling. That means economics are influenced by the olefins value chain (ethylene and C4/C5 streams feeding oligomerization/isomerization units), availability of branched C12 fractions (which compete with other specialty

intermediates), and by H₂S/sulfur recovery dynamics linked to refining and gas processing. On the cost and reliability side, mercaptan production is sensitive to catalyst performance, yield, and purification energy, and the finished product supply chain depends heavily on compliant hazardous logistics, packaging, and storage controls due to strong odor and low detection thresholds.

In one sentence: tert-dodecyl mercaptan typically earns specialty-chemical gross margins (often mid-teens to high-20% gross margin)

This report studies the global Tert-Dodecyl Mercaptan production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tert-Dodecyl Mercaptan 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 Tert-Dodecyl Mercaptan that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tert-Dodecyl Mercaptan total production and demand, 2021-2032, (Kilotons)

Global Tert-Dodecyl Mercaptan total production value, 2021-2032, (USD Million)

Global Tert-Dodecyl Mercaptan production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Tert-Dodecyl Mercaptan consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Tert-Dodecyl Mercaptan domestic production, consumption, key domestic manufacturers and share

Global Tert-Dodecyl Mercaptan production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Tert-Dodecyl Mercaptan production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Tert-Dodecyl Mercaptan production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Tert-Dodecyl Mercaptan 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 Chevronphillips, Arkema, ISU, 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 Tert-Dodecyl Mercaptan market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Kilotons) 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 Tert-Dodecyl Mercaptan Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tert-Dodecyl Mercaptan Market, Segmentation by Type:

TDM Products Based on Dodecene

TDM Products Based on Propylene

Global Tert-Dodecyl Mercaptan Market, Segmentation by Feature:

Dodecyl Alcohol High-pressure Process

Dodecyl Chloride Process

Global Tert-Dodecyl Mercaptan Market, Segmentation by Channel:

Direct Selling

Distribution

Global Tert-Dodecyl Mercaptan Market, Segmentation by Application:

Acrylonitrile Butadiene Styrene (ABS)

Nitrile Rubber (NBR)

Styrene?Butadiene Rubber (SBR)

Surfactant

Others

Companies Profiled:

Chevronphillips

Arkema

ISU

Key Questions Answered:

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

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