

# Global Tri-n-butyl Phosphate Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Tri-n-butyl Phosphate market size is expected to reach \$ 931 million by 2032, rising at a market growth of 5.2% CAGR during the forecast period (2026-2032).

Tri-n-butyl phosphate (TBP, CAS 126-73-8) is a neutral organophosphate ester formed by the esterification reaction of phosphoryl chloride (POCl<sub>3</sub>) and n-butanol. Its molecular formula is C<sub>4</sub>H<sub>9</sub>O<sub>2</sub>P, and its structure consists of one phosphate group linked by three n-butoxy groups (–OC<sub>4</sub>H<sub>9</sub>) via ester bonds. Its essential characteristics include strong hydrophobicity, moderate polarity, and good coordination ability. It can form reversible complexes with various metal ions, thus its industrial applications primarily include as a solvent, extractant, and process aid, playing a crucial role in nuclear fuel reprocessing (PUREX process), rare earth separation, and fine chemical systems. Its global market is projected to reach approximately US\$630 million in 2025, with a CAGR of 5.32%. The average price for industrial grade is US\$2,800 per ton, and the price for ultrapure grade is US\$58,000-61,000 per ton, corresponding to global sales of approximately 200,000 tons per year. Production capacity exhibits a pattern of 'nominal dispersion but actual concentration' (industry consensus). Chinese companies, relying on their integrated phosphate chemical operations and cost advantages, occupy the main supply, while European and American companies are more focused on high-purity and specialty applications.

The significance of TBP in the industry lies not in the molecule itself, but in the functional differences brought about by its 'tunable impurity system.' Therefore, the market exhibits a typical 'dumbbell-shaped structure'—low-end industrial-grade products have a large volume but low profit margins, while high-purity/reagent and standard products have a small volume but high added value. Classification should be based on 'impurity control level + process complexity + regulatory system,' dividing it into

industrial-grade (function-oriented), high-purity (emphasizing purity and traceability), nuclear-grade (emphasizing metal impurity control), and pharmaceutical-grade (emphasizing toxicology and GMP compliance). In terms of applications, TBP has irreplaceable roles in nuclear fuel reprocessing (PUREX process) and rare earth extraction. While holding a strategic position, TBP is facing pressure from alternative materials in traditional sectors such as solvents and plasticizers, but maintains stable demand as a key excipient in virus inactivation systems in biopharmaceuticals. Overall, TBP is not a high-growth sector, exhibiting a pattern of 'nominal dispersion but actual concentration.' Chinese companies, relying on their integrated phosphate chemical operations and cost advantages, occupy the main supply, while European and American companies focus more on high-purity and specialty applications. It is a 'steady-state functional chemical' driven by resources and high-end manufacturing. Its future evolution will be characterized by continuous commercialization at the low end, continuous specialization at the high end, and value reconstruction in the intermediate layer through compounding systems and process capabilities.

This report studies the global Tri-n-butyl Phosphate production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tri-n-butyl Phosphate 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 Tri-n-butyl Phosphate that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tri-n-butyl Phosphate total production and demand, 2021-2032, (Tons)

Global Tri-n-butyl Phosphate total production value, 2021-2032, (USD Million)

Global Tri-n-butyl Phosphate production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Tri-n-butyl Phosphate consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Tri-n-butyl Phosphate domestic production, consumption, key domestic manufacturers and share

Global Tri-n-butyl Phosphate production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Tri-n-butyl Phosphate production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Tri-n-butyl Phosphate production by Application, production, value, CAGR,

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

This report profiles key players in the global Tri-n-butyl Phosphate 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 Sanmenxia Zhongda Chemical, Zhangjiagang Nangang Chengming Chemical, LANXESS, TargetMol, Gansu Jingyuan Chemical, Wuxi Hongxing Chemical, Jiangxi Jiexin Technology, Jiangxi Fengxing Chemical, Wuxi Donghua Chemical, 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 Tri-n-butyl Phosphate 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 Tri-n-butyl Phosphate Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tri-n-butyl Phosphate Market, Segmentation by Type:

Industrial Grade

High Purity Grade

Nuclear Grade

Pharma Grade

Others

Global Tri-n-butyl Phosphate Market, Segmentation by Use:

Extraction Grade

Solvent Grade

Plasticizer Grade

Others

Global Tri-n-butyl Phosphate Market, Segmentation by Application:

Nuclear Industry

Rare Earth and Metal Extraction

Chemical Industry and Materials

Industrial Fluids

Special Applications

### Companies Profiled:

Sanmenxia Zhongda Chemical

Zhangjiagang Nangang Chengming Chemical

LANXESS

TargetMol

Gansu Jingyuan Chemical

Wuxi Hongxing Chemical

Jiangxi Jiexin Technology

Jiangxi Fengxing Chemical

Wuxi Donghua Chemical

### Key Questions Answered:

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

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