

Global BR Latex Market Growth 2026-2032

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Abstracts

The global BR Latex market size is predicted to grow from US\$ 1677 million in 2025 to US\$ 2445 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 2032.

BR Latex, also called Polybutadiene Rubber Latex, is a synthetic rubber latex produced through the emulsion polymerization of butadiene monomer. It consists of finely dispersed polybutadiene rubber particles in water and is mainly used as a rubber-phase intermediate in impact-modified polymer systems. Its most important application is in ABS resin production, where polybutadiene latex is grafted with styrene and acrylonitrile to form a high-rubber graft component that improves impact strength, toughness, low-temperature resistance, and overall mechanical performance.

Unlike solid polybutadiene rubber, BR latex is usually not traded as a large-volume standalone commodity; in many ABS plants, it is produced and consumed internally as a process intermediate. Direct merchant sales are relatively limited and are mainly supplied to producers of ABS, MBS impact modifiers, ASA/AAS resin systems, core-shell impact modifiers, and specialty polymer materials. In 2025, global BR Latex production is estimated at approximately 1.53 million tons on a wet latex basis, equivalent to about 0.83 million tons on a dry solids basis; the global average selling price is estimated at around USD 1,120 per ton of wet latex, or about USD 2,070 per ton on a dry solids basis, with a typical economic single-line capacity of 30,000-80,000 tons per year of wet latex and a mainstream gross margin range of approximately 15%-25%.

Global BR Latex, namely Butadiene Rubber Latex or Polybutadiene Latex, is a butadiene-based synthetic rubber latex mainly used to provide rubber phase, toughness, and impact resistance to downstream polymer systems. Its core demand does not come from general latex coating or ordinary rubber goods, but from ABS resin impact modification, MBS impact modifiers, ASA/AAS resin systems, and selected core-shell polymer modifiers. The product sits between basic synthetic rubber and functional

polymer intermediates: it is exposed to the cyclical nature of the butadiene value chain while also carrying the formulation-driven characteristics of engineering plastic modification. Regionally, the market is strongly linked to ABS and impact modifier production. Asia-Pacific is the largest production and consumption region, with China, Japan, South Korea, Taiwan, and Southeast Asia forming a relatively complete value chain around ABS, MBS, and engineering plastic modification. China, in particular, is supported by ABS capacity additions and demand from appliances, electrical and electronic products, automotive components, and modified plastics, with a large share of BR Latex produced and consumed captively within ABS production systems. Europe and North America are more mature markets, with demand concentrated in automotive, industrial components, electrical and electronic applications, weatherable materials, and specialty modification systems. In trade terms, BR Latex is not a highly commoditized long-distance traded product because it is waterborne, has limited solid content, and requires controlled storage, transport, and formulation compatibility. It is therefore more commonly produced and consumed regionally or within integrated production chains. Public product information identifies Polybutadiene Latex as an ABS impact resistant material, and typical grades are supplied as medium-to-high-solids waterborne latex, which reinforces its process-sensitive and logistics-constrained nature.

In terms of market drivers, BR Latex growth is mainly supported by the continuing need for toughness, impact strength, low-temperature performance, surface quality, and processing stability in ABS, MBS, ASA/AAS, and core-shell impact modifier systems. ABS resin remains the largest demand driver, with applications in appliance housings, consumer electronics, automotive interior and exterior parts, office equipment, toys, building materials, and industrial components. These applications require lightweight design, dimensional stability, good appearance, and impact resistance, which maintain the role of BR Latex in emulsion-grafted ABS and high-rubber-content components. MBS and core-shell impact modifiers provide additional demand, particularly in PVC, engineering plastics, and transparent or semi-transparent modification systems, where particle size distribution, gel content, latex stability, and grafting efficiency are important performance parameters. Market growth is also influenced by butadiene feedstock prices, styrene and acrylonitrile chain volatility, ABS capacity ramp-up, environmental regulation, customer qualification cycles, and process route selection. Continuous mass ABS routes, solid rubber modification routes, and externally purchased HRG or ABS powder can absorb part of the demand that would otherwise be linked to captive latex production; however, BR Latex remains a key intermediate in emulsion-grafted ABS, MBS, and core-shell impact modifier systems. Overall, the global BR Latex market is expected to grow at a moderate pace, with Asia-Pacific as the main growth center and Europe and North America focusing more on product upgrading and high-performance

grades. Market expansion is more closely tied to actual ABS and impact modifier output than to nominal capacity expansion alone. Public ABS market sources indicate that global ABS demand remains on a growth path, supported by automotive lightweighting, electrical and electronic applications, and consumer goods.

LP Information, Inc. (LPI) ' newest research report, the "BR Latex Industry Forecast" looks at past sales and reviews total world BR Latex sales in 2025, providing a comprehensive analysis by region and market sector of projected BR Latex sales for 2026 through 2032. With BR Latex sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world BR Latex industry.

This Insight Report provides a comprehensive analysis of the global BR Latex landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on BR Latex portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global BR Latex market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for BR Latex and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global BR Latex.

This report presents a comprehensive overview, market shares, and growth opportunities of BR Latex market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Small-particle BR Latex

Large-particle BR Latex

Others

Segmentation by Solid Content:

Low-solids BR Latex

Standard-solids BR Latex

High-solids and Concentrated BR Latex

Segmentation by Application:

ABS Resin

MBS Impact Modifier

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

ZEON

LG Chem

CHIMEI

Formosa Chemicals & Fibre

Liaoning Kingfa

Tianjin Dagu Chemical

CNPC

Key Questions Addressed in this Report

What is the 10-year outlook for the global BR Latex market?

What factors are driving BR Latex market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do BR Latex market opportunities vary by end market size?

How does BR Latex break out by Type, by Application?

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