

Global Tri-n-butyl Phosphate Market Growth 2026-2032

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Abstracts

The global Tri-n-butyl Phosphate market size is predicted to grow from US\$ 619 million in 2025 to US\$ 902 million in 2032; it is expected to grow at a CAGR of 5.5% from 2026 to 2032.

Tri-n-butyl phosphate (TBP, CAS 126-73-8) is a neutral organophosphate ester formed by the esterification reaction of phosphoryl chloride (POCl_3) and n-butanol. Its molecular formula is $\text{C}_4\text{H}_9\text{O}_3\text{P}$, and its structure consists of one phosphate group linked by three n-butoxy groups (OC_4H_9) 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.

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

This Insight Report provides a comprehensive analysis of the global Tri-n-butyl Phosphate 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 Tri-n-butyl Phosphate portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Tri-n-butyl Phosphate market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Tri-n-butyl Phosphate 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 Tri-n-butyl Phosphate.

This report presents a comprehensive overview, market shares, and growth opportunities of Tri-n-butyl Phosphate market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Industrial Grade

High Purity Grade

Nuclear Grade

Pharma Grade

Others

Segmentation by Use:

Extraction Grade

Solvent Grade

Plasticizer Grade

Others

Segmentation by Application:

Nuclear Industry

Rare Earth and Metal Extraction

Chemical Industry and Materials

Industrial Fluids

Special Applications

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.

Sanmenxia Zhongda Chemical

Zhangjiagang Nangang Chengming Chemical

LANXEES

TargetMol

Gansu Jingyuan Chemical

Wuxi Hongxing Chemical

Jiangxi Jiexin Technology

Jiangxi Fengxing Chemical

Wuxi Donghua Chemical

Key Questions Addressed in this Report

What is the 10-year outlook for the global Tri-n-butyl Phosphate market?

What factors are driving Tri-n-butyl Phosphate market growth, globally and by region?
Which technologies are poised for the fastest growth by market and region?
How do Tri-n-butyl Phosphate market opportunities vary by end market size?
How does Tri-n-butyl Phosphate break out by Type, by Application?

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