

Bio-Butadiene Market by Type (SBR, SBL, NBR, ABS, PB), Application (Synthetic Rubber, Fine Chemicals, Plastics), Grade (Industrial Grade), End-Use Industry (Automotive And Transportation, Chemical Processing), and Region - Global Forecast to 2029

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Abstracts

The Bio-butadiene market is projected to reach USD 94 million by 2029, at a CAGR of 10.1% from USD 58 million in 2024.

The bio-butadiene market is fueled by several key factors, notably the increasing global focus on sustainability and environmental responsibility. Governments around the world are enacting stringent regulations to reduce carbon emissions and encourage the use of eco-friendly materials, thereby creating a supportive regulatory environment for bio-based products. In response, various industries, including automotive, construction, and consumer goods, are adopting bio-butadiene to achieve their sustainability objectives and lessen reliance on fossil-based raw materials. Technological advancements in bio-refining and bioprocessing are also driving market growth, facilitating the more efficient and cost-effective production of bio-butadiene.

“Styrene butadiene rubber type, is expected to be the largest type segment for bio-butadiene market during the forecast period, in terms of value.”

Styrene butadiene rubber (SBR) is expected to hold the largest share in the bio-butadiene market due to its widespread applications and superior properties. SBR is extensively used in the automotive industry, particularly for manufacturing tires, due to its excellent abrasion resistance, durability, and ability to provide good traction. The growing demand for eco-friendly and sustainable alternatives in the automotive sector is driving the adoption of biobased SBR. Additionally, SBR is utilized in various other

industries such as construction, footwear, and consumer goods, where its flexibility, toughness, and resistance to wear make it a preferred material. The shift towards sustainable products, coupled with technological advancements in producing high-quality biobased SBR, is further propelling its market share. As industries increasingly seek to reduce their environmental footprint and adhere to stringent regulations, the demand for bio-based SBR is expected to continue growing, solidifying its dominance in the bio-butadiene market.

“Synthetic Rubber is expected to be the largest application segment for bio-butadiene market during the forecast period, in terms of value.”

Synthetic rubber applications are projected to hold the largest share in the bio-butadiene market primarily due to their extensive use in the automotive industry, particularly for tire manufacturing. Tires require materials that offer excellent durability, abrasion resistance, and performance under various conditions, all of which are provided by synthetic rubber. As the automotive industry increasingly focuses on sustainability and reducing environmental impact, the demand for bio-based synthetic rubber is rising. Additionally, synthetic rubber is used in a wide range of other applications, including industrial products, footwear, and consumer goods, due to its versatility, flexibility, and resilience. The shift towards eco-friendly materials driven by regulatory pressures and consumer preferences further supports the growth of bio-based synthetic rubber. As a result, synthetic rubber applications are expected to dominate the bio-butadiene market, driven by the need for sustainable alternatives in key industries.

“Automotive & Transportation is expected to be the fastest growing end-use industry segment for bio-butadiene market during the forecast period, in terms of value.”

The automotive and transportation sectors are expected to be the fastest-growing end-use markets for bio-butadiene due to several key factors. The global push for sustainability and reducing carbon emissions is leading automotive manufacturers to seek eco-friendly materials for vehicle components. Bio-butadiene, used in the production of synthetic rubber for tires and various automotive parts, offers a sustainable alternative to traditional petrochemical-derived products. As regulatory pressures intensify and consumer demand for greener vehicles increases, manufacturers are increasingly incorporating bio-based materials to meet these demands and enhance their environmental credentials. Furthermore, the rapid advancements in bio-refining technologies have made the production of bio-butadiene more efficient. This shift towards sustainable practices in the automotive industry,

combined with the robust growth of the transportation sector, is driving the rapid adoption of bio-butadiene, positioning it as the fastest-growing segment in the bio-butadiene market.

“Industrial grade is expected to be the largest grade segment for bio-butadiene market during the forecast period, in terms of value.”

Industrial-grade bio-butadiene is anticipated to hold the largest market share in the bio-butadiene market due to its extensive applications across various industries. This grade of bio-butadiene is particularly favored for its high performance and durability, making it suitable for demanding industrial applications such as the manufacturing of synthetic rubber, plastics, and adhesives. The automotive sector, which requires high-quality materials for tire production and other components, significantly drives the demand for industrial-grade bio-butadiene. Additionally, industries like construction, and consumer goods also rely on the superior properties of industrial-grade bio-butadiene, including its resilience, strength, and resistance to wear and tear. The growing emphasis on sustainability and the shift towards environmentally friendly raw materials further bolster the demand for industrial-grade bio-butadiene, as it provides a renewable alternative to traditional petrochemical-based products.

“Based on region, Europe was the largest market for bio-butadiene market in 2023.”

Europe is expected to have the largest market share in the bio-butadiene market due to several critical factors. The region has a strong regulatory framework promoting sustainability and the reduction of carbon emissions, driving the adoption of bio-based chemicals. European countries have set ambitious environmental targets, and industries are under pressure to transition to eco-friendly materials. The presence of a robust automotive industry, with major manufacturers and suppliers located in countries like Germany, France, and Italy, significantly boosts the demand for bio-butadiene, particularly for the production of sustainable tires and automotive components. Furthermore, Europe is a leader in research and development, with numerous initiatives and investments aimed at advancing bio-based technologies. The collaboration between industry players, research institutions, and government bodies fosters innovation and accelerates the commercialization of bio-butadiene.

In the process of determining and verifying the market size for several segments and subsegments identified through secondary research, extensive primary interviews were conducted. A breakdown of the profiles of the primary interviewees is as follows:

By Company Type: Tier 1 - 30%, Tier 2 -35%, and Tier 3 - 35%

By Designation: C-Level - 30%, Director Level - 15%, and Others - 55%

By Region: North America - 20%, Europe -25%, Asia Pacific – 35%, Middle East & Africa - 10%, and South America- 10%

The key players in this market are SABIC (Saudi Arabia), Michelin (France), Zeon Corporation (Japan), Biokemik (Spain), ETB Catalytic Technologies (Netherlands), Trinseo (US), Genomatica (US), Braskem (Brazil), Versalis (Italy), Synthos (Poland), Lummus Technology (US), INVISTA (US), LanzaTech (US), IFPEN (France), Global Bioenergies (France), Evonik Industries (Germany), Axens (France). Research Coverage

This report segments the market for the bio-butadiene market on the basis of type, application, end-use, grade and region. It provides estimations for the overall value of the market across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, products & services, key strategies, new product launches, expansions, and mergers & acquisitions associated with the market for the bio-butadiene market.

Key benefits of buying this report

This research report is focused on various levels of analysis — industry analysis (industry trends), market ranking analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the bio-butadiene market; high-growth regions; and market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers: The market growth is driven by the growing emphasis on sustainable development along with government support and reduced dependency on fossil fuels.

Market Penetration: Comprehensive information on the bio-butadiene market offered by top players in the global bio-butadiene market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the bio-butadiene market.

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for the bio-butadiene market across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global bio-butadiene market.

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the bio-butadiene market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS AND EXCLUSIONS

1.4 STUDY SCOPE

1.4.1 BIO-BUTADIENE MARKET SEGMENTATION

FIGURE 1 BIO-BUTADIENE MARKET SEGMENTATION

1.4.2 REGIONS COVERED

1.4.3 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 UNITS CONSIDERED

1.7 LIMITATIONS

1.8 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 BIO-BUTADIENE MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Primary data sources

2.1.2.3 Key primary participants

2.1.2.4 Breakdown of interviews with experts

2.1.2.5 Key industry insights

2.2 BASE NUMBER CALCULATION

2.2.1 SUPPLY-SIDE APPROACH

FIGURE 3 MARKET SIZE ESTIMATION METHODOLOGY: SUPPLY-SIDE APPROACH

2.2.2 DEMAND-SIDE APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: DEMAND-SIDE APPROACH

2.3 FORECAST NUMBER CALCULATION

2.3.1 SUPPLY SIDE

2.3.2 DEMAND SIDE

2.4 MARKET SIZE ESTIMATION

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: REVENUE OF MARKET PLAYERS

2.4.1 BOTTOM-UP APPROACH

FIGURE 6 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.4.2 TOP-DOWN APPROACH

FIGURE 7 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.5 DATA TRIANGULATION

FIGURE 8 BIO-BUTADIENE MARKET: DATA TRIANGULATION

2.6 RESEARCH ASSUMPTIONS

2.7 IMPACT OF RECESSION

2.8 GROWTH FORECAST

2.9 RISK ASSESSMENT

3 EXECUTIVE SUMMARY

FIGURE 9 STYRENE BUTADIENE RUBBER SEGMENT TO DOMINATE MARKET BETWEEN 2024 AND 2029

FIGURE 10 SYNTHETIC RUBBER APPLICATION TO LEAD MARKET BETWEEN 2024 AND 2029

FIGURE 11 INDUSTRIAL GRADE SEGMENT TO LEAD MARKET BETWEEN 2024 AND 2029

FIGURE 12 AUTOMOTIVE & TRANSPORTATION END-USE INDUSTRY TO LEAD MARKET BETWEEN 2024 AND 2029

FIGURE 13 EUROPE TO DOMINATE MARKET DURING FORECAST PERIOD

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN BIO-BUTADIENE MARKET

FIGURE 14 GROWING DEMAND FROM AUTOMOTIVE & TRANSPORTATION SECTOR TO DRIVE MARKET

4.2 BIO-BUTADIENE MARKET, BY TYPE

FIGURE 15 STYRENE BUTADIENE RUBBER TO BE FASTEST-GROWING SEGMENT DURING FORECAST PERIOD

4.3 BIO-BUTADIENE MARKET, BY COUNTRY

FIGURE 16 GERMANY TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 17 BIO-BUTADIENE MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Growing emphasis on sustainable development and government support

5.2.1.2 Stringent environmental regulations and shifting consumer trends and preferences

5.2.1.3 Technological advancements and reduced dependence on fossil fuels

5.2.2 RESTRAINTS

5.2.2.1 Limited feedstock availability

5.2.3 OPPORTUNITIES

5.2.3.1 Growing demand for sustainable products for various end-use industries

5.2.3.2 Scarcity of butadiene for use in rubber market

5.2.4 CHALLENGES

5.2.4.1 Competition from natural petroleum butadiene

5.2.4.2 High initial investments

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

6.2.1 REVENUE SHIFT AND NEW REVENUE POCKETS FOR BIO-BUTADIENE MANUFACTURERS

FIGURE 18 REVENUE SHIFT IN BIO-BUTADIENE MARKET

6.3 VALUE CHAIN ANALYSIS

FIGURE 19 OVERVIEW OF BIO-BUTADIENE MARKET VALUE CHAIN

6.3.1 FEEDSTOCK SOURCING

6.3.2 BIO-BUTADIENE PROCESSING AND PRODUCING

6.3.3 DISTRIBUTORS

6.3.4 END USERS

6.4 PRICING ANALYSIS

6.4.1 AVERAGE SELLING PRICE TREND BY REGION

TABLE 1 AVERAGE SELLING PRICE OF BIO-BUTADIENE, BY REGION, 2020–2028 (USD/METRIC TON)

FIGURE 20 BIO-BUTADIENE MATERIALS MARKET: AVERAGE SELLING PRICE TREND OF BIO-BUTADIENE, BY REGION

6.4.2 AVERAGE SELLING PRICE TREND, BY APPLICATION

TABLE 2 AVERAGE SELLING PRICE, BY APPLICATION, 2020–2028 (USD/METRIC TON)

FIGURE 21 BIO-BUTADIENE MATERIALS MARKET: AVERAGE SELLING PRICE TREND, BY APPLICATION

6.4.3 AVERAGE SELLING PRICE TREND, BY TYPE

TABLE 3 AVERAGE SELLING PRICE, BY TYPE, 2020–2028 (USD/METRIC TON)

FIGURE 22 BIO-BUTADIENE MATERIALS MARKET: AVERAGE SELLING PRICE TREND, BY TYPE

6.4.4 AVERAGE SELLING PRICE TREND, BY END-USE INDUSTRY

TABLE 4 AVERAGE SELLING PRICE, BY END-USE INDUSTRY 2020–2028 (USD/METRIC TON)

FIGURE 23 BIO-BUTADIENE MATERIALS MARKET: AVERAGE SELLING PRICE, BY END-USE INDUSTRY

6.5 ECOSYSTEM/MARKET MAP

TABLE 5 BIO-BUTADIENE MARKET: ECOSYSTEM

6.6 TECHNOLOGY ANALYSIS

TABLE 6 KEY TECHNOLOGIES IN BIO-BUTADIENE MARKET

TABLE 7 COMPLEMENTARY TECHNOLOGIES IN BIO-BUTADIENE MARKET

TABLE 8 ADJACENT TECHNOLOGIES IN BIO-BUTADIENE MARKET

6.7 PATENT ANALYSIS

6.7.1 METHODOLOGY

6.7.2 PATENTS GRANTED WORLDWIDE, 2014–2023

TABLE 9 BIO-BUTADIENE MARKET: TOTAL NUMBER OF PATENTS

6.7.3 PATENT PUBLICATION TRENDS

FIGURE 24 NUMBER OF PATENTS GRANTED (2014?2023)

6.7.4 INSIGHTS

6.7.5 LEGAL STATUS OF PATENTS

FIGURE 25 LEGAL STATUS OF PATENTS

6.7.6 JURISDICTION ANALYSIS

FIGURE 26 PATENT ANALYSIS, BY JURISDICTION, 2014?2023

6.7.7 TOP COMPANIES/APPLICANTS

FIGURE 27 TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENTS IN LAST 10 YEARS

TABLE 10 LIST OF MAJOR PATENT OWNERS FOR BIO-BUTADIENE

6.7.8 LIST OF MAJOR PATENTS

TABLE 11 MAJOR PATENTS FOR BIO-BUTADIENE

6.8 TRADE ANALYSIS

6.8.1 IMPORT SCENARIO

FIGURE 28 IMPORTS OF BIO-BUTADIENE, BY COUNTRY, 2020–2023 (USD

THOUSAND)

6.8.2 EXPORT SCENARIO

FIGURE 29 EXPORTS OF BIO- BUTADIENE, BY COUNTRY, 2020–2023 (USD THOUSAND)

6.9 KEY CONFERENCES AND EVENTS, 2024–2025

TABLE 12 BIO-BUTADIENE MARKET: DETAILED LIST OF CONFERENCES AND EVENTS, 2024–2025

6.10 REGULATORY LANDSCAPE

6.10.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 MIDDLE EAST & AFRICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 SOUTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6.10.2 REGULATIONS RELATED TO BIO-BUTADIENE MARKET

TABLE 18 LIST OF REGULATIONS FOR BIO-BUTADIENE MARKET

6.11 PORTER'S FIVE FORCES ANALYSIS

TABLE 19 BIO-BUTADIENE MARKET: PORTER'S FIVE FORCES ANALYSIS

FIGURE 30 PORTER'S FIVE FORCES ANALYSIS: BIO-BUTADIENE MARKET

6.11.1 THREAT OF SUBSTITUTES

6.11.2 THREAT OF NEW ENTRANTS

6.11.3 BARGAINING POWER OF SUPPLIERS

6.11.4 BARGAINING POWER OF BUYERS

6.11.5 INTENSITY OF COMPETITIVE RIVALRY

6.12 RAW MATERIAL ANALYSIS

6.12.1 CORN

6.12.2 SUGARCANE

6.12.3 LIGNOCELLULOSE BIOMASS

6.12.4 WASTE-TO-ENERGY FEEDSTOCK

6.13 KEY STAKEHOLDERS AND BUYING CRITERIA

6.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 31 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE END USERS

TABLE 20 INFLUENCE OF BUYERS ON BUYING PROCESS FOR TOP THREE END USERS

6.13.2 BUYING CRITERIA

FIGURE 32 KEY BUYING CRITERIA FOR END USERS

TABLE 21 KEY BUYING CRITERIA FOR END USERS

6.14 MACROECONOMIC INDICATORS

6.14.1 GDP TRENDS AND FORECASTS OF MAJOR ECONOMIES

TABLE 22 PROJECTED REAL GDP GROWTH (ANNUAL PERCENTAGE CHANGE) OF KEY COUNTRIES, 2018–2025

6.15 CASE STUDIES

6.15.1 RENEWABLE BUTADIENE: CASE FOR HYBRID PROCESSING VIA BIO- AND CHEMO-CATALYSIS

6.15.2 ASSESSING ECONOMIC AND ENVIRONMENTAL SUSTAINABILITY OF BIO-OLEFINS: CASE FOR 1,3-BUTADIENE PRODUCTION FROM BIOETHANOL

7 BIO-BUTADIENE MARKET, BY GRADE

7.1 INTRODUCTION

FIGURE 33 INDUSTRIAL GRADE SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

TABLE 23 BIO-BUTADIENE MARKET, BY GRADE, 2020–2023 (USD MILLION)

TABLE 24 BIO-BUTADIENE MARKET, BY GRADE, 2024–2029 (USD MILLION)

7.2 LABORATORY GRADE

7.2.1 CRUCIAL ROLE IN SCIENTIFIC ADVANCEMENT TO DRIVE MARKET

7.3 INDUSTRIAL GRADE

7.3.1 PRODUCTION OF SUSTAINABLE SYNTHETIC RUBBERS, PLASTICS, RESINS, AND OTHER CHEMICAL PRODUCTS TO DRIVE MARKET

8 BIO-BUTADIENE MARKET, BY TYPE

8.1 INTRODUCTION

FIGURE 34 STYRENE-BUTADIENE RUBBER SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

TABLE 25 BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (USD MILLION)

TABLE 26 BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (USD MILLION)

TABLE 27 BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (TON)

TABLE 28 BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (TON)

8.2 SBR (STYRENE-BUTADIENE RUBBER)

8.2.1 ABRASION RESISTANCE AND AGING STABILITY OF STYRENE,

FLEXIBILITY AND RESILIENCE OF BUTADIENE TO DRIVE MARKET

8.3 SBL (STYRENE-BUTADIENE LATEX)

8.3.1 DEMAND FROM ADHESIVES, COATINGS, CONSTRUCTION, AND PAPER INDUSTRIES TO DRIVE MARKET

8.4 PB (POLYBUTADIENE)

8.4.1 EXCEPTIONAL RESILIENCE, ABRASION RESISTANCE, AND LOW-TEMPERATURE FLEXIBILITY TO DRIVE MARKET

8.5 ABS (ACRYLONITRILE-BUTADIENE-STYRENE)

8.5.1 DEMAND FOR AUTOMOTIVE PARTS, CONSUMER PRODUCTS, AND INDUSTRIAL EQUIPMENT TO DRIVE MARKET

8.6 NBR (NITRILE-BUTADIENE RUBBER)

8.6.1 SUPERIOR CHEMICAL RESISTANCE AND DURABILITY TO DRIVE MARKET

8.7 SBS AND SEBS (STYRENE-BUTADIENE BLOCK COPOLYMERS)

8.7.1 EXCELLENT WEATHERABILITY AND RESISTANCE TO OIL AND CHEMICALS TO DRIVE MARKET

8.8 OTHERS

8.8.1 EPDM (ETHYLENE PROPYLENE DIENE MONOMER)

8.8.1.1 Offers durability and resistance to environmental factors

8.8.2 CHLOROPRENE RUBBER (CR)

8.8.2.1 Resistant to oils, chemicals, heat, and weathering

8.8.3 CHLOROPRENE RUBBER (CR)

8.8.3.1 Enables excellent elasticity, high tensile strength, and superior abrasion resistance

9 BIO-BUTADIENE MARKET, BY APPLICATION

9.1 INTRODUCTION

FIGURE 35 SYNTHETIC RUBBER SEGMENT TO LEAD MARKET DURING FORECAST PERIOD 2024

TABLE 29 BIO-BUTADIENE MARKET, BY APPLICATION, 2020–2023 (USD MILLION)

TABLE 30 BIO-BUTADIENE MARKET, BY APPLICATION, 2024–2029 (USD MILLION)

9.2 SYNTHETIC RUBBER

9.2.1 ENHANCED DURABILITY, RESILIENCE, AND CHEMICAL RESISTANCE OVER NATURAL RUBBER TO DRIVE MARKET

9.3 FINE CHEMICALS

9.3.1 HIGH PROCESS EFFICIENCY AND MINIMIZED ENVIRONMENTAL FOOTPRINT TO DRIVE MARKET

9.4 THERMOPLASTIC ELASTOMERS

9.4.1 RESILIENCE AND ELASTICITY OF ELASTOMERS AND PROCESSABILITY

AND RECYCLABILITY OF THERMOPLASTICS TO DRIVE MARKET

9.5 PLASTICS

9.5.1 DEMAND FROM PACKAGING, CONSTRUCTION, AUTOMOTIVE, AND CONSUMER GOODS INDUSTRIES TO DRIVE MARKET

9.6 OTHER APPLICATIONS

10 BIO-BUTADIENE MARKET, BY END-USE INDUSTRY

10.1 INTRODUCTION

FIGURE 36 AUTOMOTIVE AND TRANSPORTATION SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

TABLE 31 BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 32 BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

10.2 AUTOMOTIVE AND TRANSPORTATION

10.2.1 TIGHTENING EMISSION REGULATIONS, DEMAND FOR ECO-FRIENDLY VEHICLES, AND SUPPLY CHAIN RESILIENCE TO DRIVE MARKET

10.3 CONSUMER GOODS

10.3.1 DURABLE, HIGH-PERFORMING, AND ECO-FRIENDLY PRODUCTS MEETING ENVIRONMENTAL REGULATIONS TO DRIVE MARKET

10.4 CHEMICAL PROCESSING

10.4.1 CREATION OF BIO-BASED ALTERNATIVES TO CONVENTIONAL PETROCHEMICAL-DERIVED PRODUCTS TO DRIVE MARKET

10.5 BUILDING AND CONSTRUCTION

10.5.1 ENHANCED STRUCTURAL INTEGRITY AND DURABILITY OF CONSTRUCTION MATERIALS TO DRIVE MARKET

10.6 TEXTILE

10.6.1 ELASTICITY, STRENGTH, AND RESISTANCE TO WRINKLING, ALONG WITH ENVIRONMENTAL SUSTAINABILITY TO DRIVE MARKET

10.7 MEDICAL

10.7.1 HIGH ELASTICITY, DURABILITY, AND RESISTANCE TO CONTAMINANTS TO DRIVE MARKET

10.8 OTHER END-USE INDUSTRIES

10.8.1 ELECTRONICS

10.8.2 PACKAGING

10.8.3 RENEWABLE ENERGY

11 BIO-BUTADIENE MARKET, BY REGION

11.1 INTRODUCTION

FIGURE 37 EUROPE TO BE FASTEST-GROWING MARKET DURING FORECAST PERIOD

TABLE 33 BIO-BUTADIENE MARKET, BY REGION, 2020–2023 (USD MILLION)

TABLE 34 BIO-BUTADIENE MARKET, BY REGION, 2024–2029 (USD MILLION)

TABLE 35 BIO-BUTADIENE MARKET, BY REGION , 2020–2023 (TON)

TABLE 36 BIO-BUTADIENE MARKET, BY REGION, 2024–2029 (TON)

11.2 ASIA PACIFIC

11.2.1 IMPACT OF RECESSION

FIGURE 38 ASIA PACIFIC: BIO-BUTADIENE MARKET SNAPSHOT

TABLE 37 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 38 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 39 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (TON)

TABLE 40 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (TON)

TABLE 41 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (USD MILLION)

TABLE 42 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (USD MILLION)

TABLE 43 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (TON)

TABLE 44 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (TON)

TABLE 45 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY GRADE, 2020–2023 (USD MILLION)

TABLE 46 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY GRADE, 2024–2029 (USD MILLION)

TABLE 47 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY APPLICATION, 2020–2023 (USD MILLION)

TABLE 48 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY APPLICATION, 2024–2029 (USD MILLION)

TABLE 49 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 50 ASIA PACIFIC: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.2.1.1 China

11.2.1.1.1 Significant capital investments toward sustainability to drive market

TABLE 51 CHINA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 52 CHINA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.2.1.2 Japan

11.2.1.2.1 Government support, industry participation, and technological advancements to drive market

TABLE 53 JAPAN: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 54 JAPAN: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.2.1.3 South Korea

11.2.1.3.1 High share of global synthetic rubber production to drive market

TABLE 55 SOUTH KOREA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 56 SOUTH KOREA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.2.1.4 India

11.2.1.4.1 Significant economic growth and development to drive market

TABLE 57 INDIA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 58 INDIA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.2.1.5 Rest of Asia Pacific

TABLE 59 REST OF ASIA PACIFIC BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 60 REST OF ASIA PACIFIC: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.3 NORTH AMERICA

11.3.1 IMPACT OF RECESSION

FIGURE 39 NORTH AMERICA: BIO-BUTADIENE MARKET SNAPSHOT

TABLE 61 NORTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 62 NORTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 63 NORTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (TON)

TABLE 64 NORTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (TON)

TABLE 65 NORTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023
(USD MILLION)

TABLE 66 NORTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029
(USD MILLION)

TABLE 67 NORTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023
(TON)

TABLE 68 NORTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029
(TON)

TABLE 69 NORTH AMERICA: BIO-BUTADIENE MARKET, BY GRADE, 2020–2023
(USD MILLION)

TABLE 70 NORTH AMERICA: BIO-BUTADIENE MARKET, BY GRADE, 2024–2029
(USD MILLION)

TABLE 71 NORTH AMERICA: BIO-BUTADIENE MARKET, BY APPLICATION,
2020–2023 (USD MILLION)

TABLE 72 NORTH AMERICA: BIO-BUTADIENE MARKET, BY APPLICATION,
2024–2029 (USD MILLION)

TABLE 73 NORTH AMERICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,
2020–2023 (USD MILLION)

TABLE 74 NORTH AMERICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,
2024–2029 (USD MILLION)

11.3.1.1 US

11.3.1.1.1 Bioeconomy Initiative and Farm Bill to drive market

TABLE 75 US: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023
(USD MILLION)

TABLE 76 US: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029
(USD MILLION)

11.3.1.2 Canada

11.3.1.2.1 Initiatives fostering clean growth and reducing greenhouse gas emissions
to drive market

TABLE 77 CANADA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,
2020–2023 (USD MILLION)

TABLE 78 CANADA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,
2024–2029 (USD MILLION)

11.3.1.3 Mexico

11.3.1.3.1 Government initiatives to drive bio-butadiene and synthetic rubber
industries

TABLE 79 MEXICO: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,
2020–2023 (USD MILLION)

TABLE 80 MEXICO: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,

2024–2029 (USD MILLION)

11.4 EUROPE

FIGURE 40 EUROPE: BIO-BUTADIENE MARKET SNAPSHOT

11.4.1 IMPACT OF RECESSION

TABLE 81 EUROPE: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 82 EUROPE: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 83 EUROPE: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (TON)

TABLE 84 EUROPE: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (TON)

TABLE 85 EUROPE: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (USD MILLION)

TABLE 86 EUROPE: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (USD MILLION)

TABLE 87 EUROPE: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (TON)

TABLE 88 EUROPE: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (TON)

TABLE 89 EUROPE: BIO-BUTADIENE MARKET, BY GRADE, 2020–2023 (USD MILLION)

TABLE 90 EUROPE: BIO-BUTADIENE MARKET, BY GRADE, 2024–2029 (USD MILLION)

TABLE 91 EUROPE BIO-BUTADIENE MARKET, BY APPLICATION, 2020–2023 (USD MILLION)

TABLE 92 EUROPE: BIO-BUTADIENE MARKET, BY APPLICATION, 2024–2029 (USD MILLION)

TABLE 93 EUROPE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 94 EUROPE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.4.1.1 Germany

11.4.1.1.1 Ambitious environmental regulations aimed at reducing greenhouse gas emissions to drive market

TABLE 95 GERMANY: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 96 GERMANY: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.4.1.2 UK

11.4.1.2.1 Adoption of sustainable practices in automotive and construction industries to drive market

TABLE 97 UK: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023

(USD MILLION)

TABLE 98 UK: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029

(USD MILLION)

11.4.1.3 France

11.4.1.3.1 Stringent environmental regulations and promotion of bio-based economy to drive market

TABLE 99 FRANCE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 100 FRANCE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.4.1.4 Italy

11.4.1.4.1 Growing environmental consciousness among consumers and industries to drive market

TABLE 101 ITALY: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 102 ITALY: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.4.1.5 Spain

11.4.1.5.1 Well-established automotive industry and demand for environmentally friendly building materials to drive market

TABLE 103 SPAIN: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 104 SPAIN: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.4.1.6 Russia

11.4.1.6.1 Expanding automotive and construction sectors to drive market

TABLE 105 RUSSIA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 106 RUSSIA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.4.1.7 Rest of Europe

TABLE 107 REST OF EUROPE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 108 REST OF EUROPE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.5 SOUTH AMERICA

11.5.1 IMPACT OF RECESSION

TABLE 109 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 110 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 111 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (TON)

TABLE 112 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (TON)

TABLE 113 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (USD MILLION)

TABLE 114 SOUTH AMERICA :BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (USD MILLION)

TABLE 115 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (TON)

TABLE 116 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (TON)

TABLE 117 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY GRADE, 2020–2023 (USD MILLION)

TABLE 118 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY GRADE, 2024–2029 (USD MILLION)

TABLE 119 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY APPLICATION, 2020–2023 (USD MILLION)

TABLE 120 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY APPLICATION, 2024–2029 (USD MILLION)

TABLE 121 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 122 SOUTH AMERICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.5.1.1 Brazil

11.5.1.1.1 Significant production of ethanol and large automotive industry to drive market

TABLE 123 BRAZIL: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 124 BRAZIL: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.5.1.2 Argentina

11.5.1.2.1 Large agricultural sector and increase in vehicle production to drive market

TABLE 125 ARGENTINA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 126 ARGENTINA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY,

2024–2029 (USD MILLION)

11.5.1.3 Rest of South America

TABLE 127 REST OF SOUTH AMERICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 128 REST OF SOUTH AMERICA :BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.6 MIDDLE EAST & AFRICA

11.6.1 IMPACT OF RECESSION

TABLE 129 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (USD MILLION)

TABLE 130 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (USD MILLION)

TABLE 131 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2020–2023 (TON)

TABLE 132 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY COUNTRY, 2024–2029 (TON)

TABLE 133 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (USD MILLION)

TABLE 134 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (USD MILLION)

TABLE 135 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY TYPE, 2020–2023 (TON)

TABLE 136 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY TYPE, 2024–2029 (TON)

TABLE 137 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY GRADE, 2020–2023 (USD MILLION)

TABLE 138 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY GRADE, 2024–2029 (USD MILLION)

TABLE 139 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY APPLICATION, 2020–2023 (USD MILLION)

TABLE 140 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY APPLICATION, 2024–2029 (USD MILLION)

TABLE 141 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 142 MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.6.1.1 GCC

11.6.1.1.1 Saudi Arabia

11.6.1.1.1.1 Sustainable manufacturing, strategic collaborations, and growing

construction sector to drive market

TABLE 143 SAUDI ARABIA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 144 SAUDI ARABIA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.6.1.1.2 UAE

11.6.1.1.2.1 Robust growth of construction sector, sustainable development, and substantial investments in chemical production to drive market

TABLE 145 UAE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 146 UAE: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.6.1.2 Rest of GCC

TABLE 147 REST OF GCC: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 148 REST OF GCC: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.6.1.2.1 South Africa

11.6.1.2.1.1 Significant chemical production and increasing focus on environmentally conscious development to drive market

TABLE 149 SOUTH AFRICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 150 SOUTH AFRICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

11.6.1.3 Rest of Middle East & Africa

TABLE 151 REST OF MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2020–2023 (USD MILLION)

TABLE 152 REST MIDDLE EAST & AFRICA: BIO-BUTADIENE MARKET, BY END-USE INDUSTRY, 2024–2029 (USD MILLION)

12 COMPETITIVE LANDSCAPE

12.1 INTRODUCTION

12.2 KEY PLAYER STRATEGIES/ RIGHT TO WIN

TABLE 153 OVERVIEW OF STRATEGIES ADOPTED BY KEY BIO-BUTADIENE PLAYERS

12.3 MARKET SHARE ANALYSIS

12.3.1 RANKING OF KEY MARKET PLAYERS, 2023

FIGURE 41 RANKING OF TOP THREE PLAYERS IN BIO-BUTADIENE MARKET,

2023

12.3.2 MARKET SHARE OF KEY PLAYERS

TABLE 154 BIO-BUTADIENE MARKET: DEGREE OF COMPETITION

FIGURE 42 SHARE OF KEY PLAYERS IN BIO-BUTADIENE MARKET, 2023

12.4 REVENUE ANALYSIS

FIGURE 43 REVENUE ANALYSIS OF TOP 3 PLAYERS, 2020–2024

12.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

12.5.1 STARS

12.5.2 EMERGING LEADERS

12.5.3 PERVASIVE PLAYERS

12.5.4 PARTICIPANTS

FIGURE 44 BIO-BUTADIENE MARKET: COMPANY EVALUATION MATRIX, 2023

12.5.5 COMPETITIVE BENCHMARKING: KEY PLAYERS, 2023

TABLE 155 TYPE: COMPANY FOOTPRINT (11 COMPANIES)

TABLE 156 APPLICATION: COMPANY FOOTPRINT (11 COMPANIES)

TABLE 157 END-USE INDUSTRY: COMPANY FOOTPRINT (11 COMPANIES)

TABLE 158 REGION: COMPANY FOOTPRINT (11 COMPANIES)

FIGURE 45 BIO-BUTADIENE MARKET: OVERALL COMPANY FOOTPRINT

12.6 COMPANY VALUATION AND FINANCIAL METRICS

FIGURE 46 EV/EBITDA OF KEY VENDORS

FIGURE 47 YEAR-TO-DATE (YTD) PRICE TOTAL RETURN

12.7 COMPETITIVE SCENARIO AND TRENDS

12.7.1 PRODUCT LAUNCHES

TABLE 159 BIO-BUTADIENE MARKET: PRODUCT LAUNCHES (JANUARY 2014–MAY 2024)

12.7.2 DEALS

TABLE 160 BIO-BUTADIENE MARKET: DEALS (JANUARY 2014–MAY 2024)

12.7.3 OTHER DEVELOPMENTS

TABLE 161 BIO-BUTADIENE MARKET: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13 COMPANY PROFILES

(Business Overview, Products Offered, Recent Developments, MnM View Right to win, Strategic choices made, Weaknesses and competitive threats) *

13.1 KEY PLAYERS

13.1.1 SABIC

TABLE 162 SABIC: COMPANY OVERVIEW

FIGURE 48 SABIC: COMPANY SNAPSHOT

TABLE 163 SABIC: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 164 SABIC: DEALS (JANUARY 2014–MAY 2024)

TABLE 165 SABIC: EXPANSIONS (JANUARY 2014–MAY 2024)

TABLE 166 SABIC: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.2 ETB CATALYTIC TECHNOLOGIES & TRINSEO

TABLE 167 ETB CATALYTIC TECHNOLOGIES: COMPANY OVERVIEW

TABLE 168 ETB CATALYTIC TECHNOLOGIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 169 ETB CATALYTIC TECHNOLOGIES: DEALS (JANUARY 2014–MAY 2024)

TABLE 170 ETB CATALYTIC TECHNOLOGIES: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.3 GENOMATICA, INC. & VERSALIS

TABLE 171 GENOMATICA, INC.: COMPANY OVERVIEW

TABLE 172 GENOMATICA, INC.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 173 GENOMATICA, INC.: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.4 SYNTHOS & LIMMUS TECHNOLOGY, LLC.

TABLE 174 SYNTHOS: COMPANY OVERVIEW

TABLE 175 SYNTHOS: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 176 SYNTHOS: DEALS (JANUARY 2014–MAY 2024)

TABLE 177 SYNTHOS: EXPANSIONS (JANUARY 2014–MAY 2024)

TABLE 178 SYNTHOS: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.5 INVISTA & LANZATECH

TABLE 179 INVISTA: COMPANY OVERVIEW

TABLE 180 INVISTA: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 181 INVISTA: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.6 BRASKEM S.A.

TABLE 182 BRASKEM S.A.: COMPANY OVERVIEW

FIGURE 49 BRASKEM S.A.: COMPANY SNAPSHOT

TABLE 183 BRASKEM S.A.: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 184 BRASKEM S.A.: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.7 EVONIK INDUSTRIES

TABLE 185 EVONIK INDUSTRIES: COMPANY OVERVIEW

FIGURE 50 EVONIK INDUSTRIES: COMPANY SNAPSHOT

TABLE 186 EVONIK INDUSTRIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 187 EVONIK INDUSTRIES: PRODUCT LAUNCHES (JANUARY 2014–MAY 2024)

TABLE 188 EVONIK INDUSTRIES: DEALS (JANUARY 2014–MAY 2024)

TABLE 189 EVONIK INDUSTRIES: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

2024)

13.1.8 BIOKEMIK

TABLE 190 BIOKEMIK: COMPANY OVERVIEW

TABLE 191 BIOKEMIK: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 192 BIOKEMIK: DEALS (JANUARY 2014–MAY 2024)

TABLE 193 BIOKEMIK: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.9 MICHELIN & IFPENS & AXENS

TABLE 194 MICHELIN: COMPANY OVERVIEW

FIGURE 51 MICHELIN: COMPANY SNAPSHOT

TABLE 195 MICHELIN: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 196 MICHELIN: DEALS (JANUARY 2014–MAY 2024)

TABLE 197 MICHELIN: EXPANSIONS (JANUARY 2014–MAY 2024)

TABLE 198 MICHELIN: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.10 ZEON CORPORATION

TABLE 199 ZEON CORPORATION: COMPANY OVERVIEW

FIGURE 52 ZEON CORPORATION: COMPANY SNAPSHOT

TABLE 200 ZEON CORPORATION: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 201 ZEON CORPORATION: OTHER DEVELOPMENTS (JANUARY 2014–MAY 2024)

13.1.11 GLOBAL BIOENERGIES

TABLE 202 GLOBAL BIOENERGIES: COMPANY OVERVIEW

FIGURE 53 GLOBAL BIOENERGIES: COMPANY SNAPSHOT

TABLE 203 GLOBAL BIOENERGIES: PRODUCTS/SOLUTIONS/SERVICES OFFERED

TABLE 204 GLOBAL BIOENERGIES: EXPANSIONS (JANUARY 2014–MAY 2024)

*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

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