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Butadiene Market & Its Derivatives (SBR, PBR, ABS, SB Latex, Adiponitrile, NR, & Others) Market, by Applications & Geography - Trends and Forecasts to 2018

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Abstracts

Butadiene or 1,3-butadiene is a colorless gas that is condensed to liquid just below minus 4.0°C and is highly reactive. It is soluble in alcohol and ether, but insoluble in water and is polymerized easily in the presence of oxygen. It is obtained as a byproduct of the manufacture of ethylene and propylene by selective distillation of cracked naphtha or gas oil stream. It is an important feedstock to manufacture various chemicals and materials that further serve diverse industries that include automotive, paints, textile, appliance manufacturing, etc. Its main application segments include SBR, Polybutadiene Rubber (PBR), Acrylonitrile Butadiene Styrene Resins (ABS), Styrene Butadiene Latex (SB Latex), Adiponitrile, and Nitrile Rubber (NR).

This market has grown considerably during the past few years and is expected to grow at a rapid pace in the next five years, mainly driven by growing demand in the Asia-Pacific region. Asia-Pacific is the biggest consumer of butadiene, followed by Europe and North America, which consumed more than half of the total global demand in 2012. China is the biggest consumer of butadiene, and is also among the fastest growing markets with a CAGR of about 6.2% from 2013 to 2018. The European and North American markets are comparatively mature with a demand growth well below the average market growth.

SBR manufacturers are the largest consumers of this product, which consumed less than one third of the total global demand. PBR manufacturers are the second largest consumers and also the fastest growing end-use segment of butadiene, with an expected CAGR of about 4.9% from 2013 to 2018.

This study basically aims to estimate the global market of butadiene and its derivatives for 2013 and to project the expected demand of the same by 2018. This market research study provides a detailed qualitative and quantitative analysis of this global market. It provides a comprehensive review of major market drivers, restraints, opportunities, winning imperatives, challenges, and key issues in the market. The market is further segmented and projected for major regions such as Asia-Pacific, North America, Europe, and ROW, which is further segmented for key countries in each region. We have used various secondary sources such as encyclopedia, directories, and databases to identify & collect information useful for this extensive commercial study of this global market. The primary sources–experts from related industries and suppliers have been interviewed to obtain and verify critical information as well as to assess the future prospects of butadiene and its derivatives.

Competitive scenarios of top players in this global market have been discussed in detail. We have also profiled leading players of this industry with their recent developments and other strategic industry activities. These include: Royal Dutch Shell Plc. (The Netherlands), LyondellBasell Industries N.V. (The Netherlands), TPC Group Inc. (U.S.), Sinopec (China), BASF SE (Germany), ExxonMobil Chemical Company (U.S.), Braskem S.A. (Brazil), ENI S.p.A (Italy), etc.

Scope of the report: This research report categorizes this global market on the basis of applications and geography along with forecasting volumes, revenues and analyzing trends in each of the submarkets. It also contains the market for various derivatives at a country level.

On the basis of applications: This global market is segmented on the basis of industry applications as Styrene Butadiene Rubber (SBR), PBR, Acrylonitrile Butadiene Styrene Resins (ABS), SB Latex, Adiponitrile, Nitrile Rubber (NR), and others. Each application is further described in detail in the report with volume and revenue forecasts for each application.

On the basis of geography: A country level segmentation is done for both butadiene and its derivatives for key regions that include Asia-Pacific, North America, Europe, and ROW, and further for key countries in each region that include China, Japan, India, South Korea, U.S., Mexico, Germany, France, Russia, and Brazil.

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About

The butadiene industry is witnessing high growth on account of growing end-use applications, technological advancements, and growing demand in the Asia-Pacific region. It is largely used in industries such as styrene butadiene rubber (SBR), polybutadiene rubber (PBR), acrylonitrile butadiene styrene (ABS), styrene butadiene latex (SB Latex), adiponitrile, nitrile rubber (NR), etc.

The market for butadiene was about XX KT in 2012 and is further forecasted to grow at a CAGR of XX% from 2013 to 2018, to reach XX kilo tons by 2018. Asia-Pacific dominated the butadiene market and consumed about XX% in 2012. A rapidly growing end-user industry demand in this region drives the growth of the butadiene market. ROW is expected to show the highest CAGR of XX%, mainly driven by various upcoming end-user industries in Latin America and the Middle East.

The butadiene market was about $XX million in 2012 and is further expected to be about $XX million by 2018, growing at a CAGR of XX% from 2013 to 2018. A huge price hike was recorded in 2011 and 2012, due to which the market in terms of value went quite high, followed by a sudden price downfall in 2013. Asia-Pacific led the butadiene market owing to rapid growth in end-user industries in China; it is a highly lucrative market for its manufacturers. Europe and North America constitute the second and third largest market respectively for butadiene. These regions collectively account for XX% of the total revenue garnered by the butadiene market.

The drivers of the industry are identified as growing demand in Asia-Pacific and growth by the tire industry. The restraining factor is identified as the maturity of the product. The major issue pertaining in the market is a shift in feedstock of cracking units. Industry players follow strategies such as capacity expansions and technological innovations to address demands generated by end-user industries in developing countries. Key participants in the market include Royal Dutch Shell Plc. (The Netherlands), LyondellBasell Industries N.V. (The Netherlands), TPC Group Inc. (U.S.), Sinopec (China), BASF SE (Germany), ExxonMobil Chemical Company (U.S.), etc.

Sustainable Raw Material Supply in Upcoming Non Integrated Plants in China

China is the most populated country in the world, with a population of about XX billion and is the second biggest economy with a high GDP growth. Its chemical industry accounts for about XX% of the country’s GDP with a high industry growth rate. Almost

XX% of the base chemical demand comes from China. The country consumed about XX% of butadiene demanded in 2012 with an estimated annual growth of about XX% from 2013 to 2018. China is a net importer of butadiene and its derivatives with net imports of about XX% to XX% of the total butadiene demand.

The deficit of butadiene derivatives is increasing at a high pace in China and in order to reduce this deficit, various companies have announced new plants for butadiene and its derivatives in the country, so that they can act as a reliable source of chemicals and materials associated with butadiene. There is a considerable forward integration in the current and upcoming butadiene projects, but still there are enormous upcoming plants of SBR, ABS, NR, and Adiponitrile in China, which are not integrated with butadiene plants.

Potential Export Market in U.S.

The U.S. was the second largest consumer of butadiene in 2012, which consumed about XX% of the total demand. It is also one among the major importers of butadiene, with about XX% of its demand met by net imports from other countries. Domestic production of butadiene in the U.S. is quite stagnant with quite low operating rates that are due to a significant shift in the raw materials being fed to cracking units. After the development of shale gas in the country, gas feedstock prices went down significantly as compared to naphtha, that is why a number of the players changed the feed of cracking units to natural gas, instead of naphtha. This ultimately resulted in increased ethylene to butadiene production ratios, thereby reducing the operating rates of butadiene plants.

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