

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

<https://marketpublishers.com/r/BB2A6441B9AEN.html>

Date: October 2013

Pages: 265

Price: US\$ 5,650.00 (Single User License)

ID: BB2A6441B9AEN

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.

Contents

1 INTRODUCTION

- 1.1 KEY TAKE-AWAYS
- 1.2 REPORT DESCRIPTION
- 1.3 STAKEHOLDERS
- 1.4 RESEARCH METHODOLOGY
 - 1.4.1 MARKET SIZE
 - 1.4.2 MAJOR SECONDARY SOURCES USED
 - 1.4.3 KEY DATA POINTS TAKEN FROM SECONDARY SOURCES
 - 1.4.4 KEY DATA POINTS TAKEN FROM PRIMARY SOURCES
 - 1.4.5 ASSUMPTIONS

2 EXECUTIVE SUMMARY

3 PREMIUM INSIGHTS

- 3.1 BUTADIENE MARKET SEGMENTS
- 3.2 BUTADIENE MARKET DYNAMICS
- 3.3 BUTADIENE MARKET OUTLOOK
- 3.4 BUTADIENE DERIVATIVES OUTLOOK

4 MARKET OVERVIEW

- 4.1 INTRODUCTION
- 4.2 VALUE CHAIN ANALYSIS
- 4.3 MARKET DYNAMICS
 - 4.3.1 DRIVERS
 - 4.3.1.1 Growth by the Tire Industry
 - 4.3.1.2 Growing Demand in Asia-Pacific
 - 4.3.2 RESTRAINT
 - 4.3.2.1 Maturity of the Product
 - 4.3.3 OPPORTUNITIES
 - 4.3.3.1 Sustainable Raw Material Supply in Upcoming Non Integrated Plants in China
 - 4.3.3.2 Potential Export Market in U.S.
- 4.4 BURNING ISSUE
 - 4.4.1 FEEDSTOCK SHIFT
- 4.5 WINNING IMPERATIVES

- 4.5.1 INTEGRATION
- 4.6 REGULATIONS
- 4.7 RAW MATERIAL ANALYSIS
 - 4.7.1 NAPHTHA & GAS OIL
 - 4.7.2 ETHANE
 - 4.7.3 PROPANE
 - 4.7.4 BUTANE
 - 4.7.5 NATURAL GAS
- 4.8 PORTERS FIVE FORCES ANALYSIS
 - 4.8.1 THREAT OF NEW ENTRANTS
 - 4.8.2 THREAT OF SUBSTITUTES
 - 4.8.3 BUYERS POWER
 - 4.8.4 SUPPLIERS POWER
 - 4.8.5 DEGREE OF COMPETITION
- 4.9 MARKET SHARE ANALYSIS

5 BIO-BUTADIENE OVERVIEW

- 5.1 INTRODUCTION
- 5.2 DEVELOPMENTS

6 BUTADIENE & DERIVATIVES PLANT CAPACITIES

- 6.1 BUTADIENE PLANT CAPACITIES
- 6.2 ACRYLONITRILE BUTADIENE STYRENE
- 6.3 POLYBUTADIENE RUBBER
- 6.4 STYRENE BUTADIENE RUBBER
- 6.5 NITRILE RUBBER

7 BUTADIENE MARKET

- 7.1 BUTADIENE MARKET, BY DERIVATIVE
 - 7.1.1 INTRODUCTION
 - 7.1.2 STYRENE BUTADIENE RUBBER
 - 7.1.3 POLYBUTADIENE RUBBER
 - 7.1.4 ACRYLONITRILE BUTADIENE STYRENE
 - 7.1.5 SB LATEX
 - 7.1.6 NITRILE RUBBER
 - 7.1.7 ADIPONITRILE

7.1.8 OTHERS

7.2 BUTADIENE MARKET, BY GEOGRAPHY

7.2.1 INTRODUCTION

7.2.2 NORTH AMERICA

7.2.2.1 Overview

7.2.2.2 U.S.

7.2.2.3 Mexico

7.2.3 EUROPE

7.2.3.1 Overview

7.2.3.2 Germany

7.2.3.3 France

7.2.3.4 Russia

7.2.3.5 Italy

7.2.4 ASIA-PACIFIC

7.2.4.1 Overview

7.2.4.2 China

7.2.4.3 Japan

7.2.4.4 South Korea

7.2.4.5 India

7.2.5 ROW

7.2.5.1 Overview

7.2.5.2 Brazil

8 BUTADIENE DERIVATIVES MARKET

8.1 INTRODUCTION

8.2 ACRYLONITRILE BUTADIENE STYRENE

8.2.1 OVERVIEW

8.2.2 ABS APPLICATION MARKET

8.2.3 ABS REGIONAL ANALYSIS

8.2.3.1 North America, Country Analysis

8.2.3.2 Europe, Country Analysis

8.2.3.3 Asia-Pacific, Country Analysis

8.2.3.4 ROW, Country Analysis

8.3 STYRENE BUTADIENE RUBBER

8.3.1 OVERVIEW

8.3.2 SBR APPLICATION MARKET

8.3.3 SBR REGIONAL ANALYSIS

8.3.3.1 North America, Country Analysis

8.3.3.2 Europe, Country Analysis

8.3.3.3 Asia-Pacific, Country Analysis

8.3.3.4 ROW, Country Analysis

8.4 POLYBUTADIENE RUBBER

8.4.1 OVERVIEW

8.4.2 PBR APPLICATION MARKET

8.4.3 PBR REGIONAL ANALYSIS

8.4.3.1 North America, Country Analysis

8.4.3.2 Europe, Country Analysis

8.4.3.3 Asia-Pacific, Country Analysis

8.4.3.4 ROW, Country Analysis

8.5 STYRENE BUTADIENE LATEX

8.5.1 OVERVIEW

8.5.2 SB LATEX APPLICATION MARKET

8.5.3 SB LATEX REGIONAL ANALYSIS

8.5.3.1 North America, Country Analysis

8.5.3.2 Europe, Country Analysis

8.5.3.3 Asia-Pacific, Country Analysis

8.5.3.4 ROW, Country Analysis

8.6 NITRILE RUBBER

8.6.1 OVERVIEW

8.6.2 NR REGIONAL ANALYSIS

8.6.2.1 North America, Country Analysis

8.6.2.2 Europe, Country Analysis

8.6.2.3 Asia-Pacific, Country Analysis

8.6.2.4 ROW, Country Analysis

8.7 ADIPONITRILE

8.7.1 OVERVIEW

8.7.2 ADIPONITRILE REGIONAL ANALYSIS

9 COMPETITIVE LANDSCAPE

9.1 INTRODUCTION

9.2 EXPANSION: THE MOST POPULAR GROWTH STRATEGY

9.3 MAXIMUM DEVELOPMENTS IN 2012

9.4 ASIA-PACIFIC: REGION WITH MAXIMUM DEVELOPMENTS

9.5 NIZHNEKAMSKNEFTEKHIM OAO, LANXESS AG, BRASKEM S.A.: THE LEADING MARKET PARTICIPANTS

10 COMPANY PROFILES(OVERVIEW, FINANCIALS, PRODUCTS & SERVICES, STRATEGY, AND DEVELOPMENTS)

- 10.1 BASF SE
- 10.2 BRASKEM S.A.
- 10.3 CHINA PETROLEUM & CHEMICAL CORPORATION
- 10.4 ENI S.P.A.
- 10.5 EVONIK INDUSTRIES AG
- 10.6 EXXONMOBIL CHEMICAL COMPANY
- 10.7 FORMOSA PLASTICS GROUP
- 10.8 INEOS GROUP AG
- 10.9 JSR CORPORATION
- 10.10 LANXESS AG
- 10.11 LG CHEM LIMITED
- 10.12 LYONDELLBASELL INDUSTRIES N.V.
- 10.13 NIZHNEKAMSKNEFTEKHIM OAO
- 10.14 RELIANCE INDUSTRIES LIMITED
- 10.15 REPSOL S.A.
- 10.16 ROYAL DUTCH SHELL PLC
- 10.17 SAUDI BASIC INDUSTRIES CORPORATION
- 10.18 STYROLUTION GROUP GMBH
- 10.19 THE DOW CHEMICAL COMPANY
- 10.20 TPC GROUP INC.(Details on overview, financials, product & services, strategy, and developments might not be captured in case of unlisted companies.)

List Of Tables

LIST OF TABLES

TABLE 1 BUTADIENE: MARKET VOLUME, BY GEOGRAPHY, 2011–2018 (KT)

TABLE 2 BUTADIENE: MARKET VALUE, BY GEOGRAPHY, 2011–2018 (\$MILLION)

TABLE 3 BUTADIENE: PROPERTIES

TABLE 4 AUTOMOTIVE OWNERSHIP PER PERSON, 2010

TABLE 5 ASIA-PACIFIC: BUTADIENE DERIVATIVES, UPCOMING PLANT CAPACITIES

TABLE 6 CHINA: UPCOMING BUTADIENE DERIVATIVE PLANTS

TABLE 7 NAPHTHA: ANNUAL AVERAGE PRICE, 2011–2018 (\$/TON)

TABLE 8 SBR: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 9 PBR: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 10 ABS: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 11 SB LATEX: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 12 NR: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 13 ADIPONITRILE: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 14 OTHERS: BUTADIENE MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 15 U.S.: MAJOR TRADE MARKETS

TABLE 16 U.S.: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 17 U.S.: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 18 MEXICO: MAJOR TRADE MARKETS

TABLE 19 MEXICO: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 20 MEXICO: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 21 GERMANY: MAJOR TRADE MARKETS

TABLE 22 GERMANY: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 23 GERMANY: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018

(\$MILLION)

TABLE 24 FRANCE: MAJOR TRADE MARKETS

TABLE 25 FRANCE: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 26 FRANCE: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018
(\$MILLION)

TABLE 27 RUSSIA: MAJOR TRADE MARKETS

TABLE 28 RUSSIA: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 29 RUSSIA: BUTADIENE MARKET VALUE , BY APPLICATION, 2011–2018
(\$MILLION)

TABLE 30 ITALY: MAJOR TRADE MARKETS

TABLE 31 ITALY: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 32 ITALY: BUTADIENE MARKET VALUE , BY APPLICATION, 2011–2018
(\$MILLION)

TABLE 33 CHINA: MAJOR TRADE MARKETS

TABLE 34 CHINA: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 35 CHINA: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018
(\$MILLION)

TABLE 36 JAPAN: MAJOR TRADE MARKETS

TABLE 37 JAPAN: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 38 JAPAN: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018
(\$MILLION)

TABLE 39 SOUTH KOREA: MAJOR TRADE MARKETS

TABLE 40 SOUTH KOREA: BUTADIENE MARKET VOLUME, BY APPLICATION,
2011–2018 (KT)

TABLE 41 SOUTH KOREA: BUTADIENE MARKET VALUE, BY APPLICATION,
2011–2018 (\$MILLION)

TABLE 42 INDIA: MAJOR TRADE MARKETS

TABLE 43 INDIA: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 44 INDIA: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018
(\$MILLION)

TABLE 45 BRAZIL: MAJOR TRADE MARKETS

TABLE 46 BRAZIL: BUTADIENE MARKET VOLUME, BY APPLICATION, 2011–2018
(KT)

TABLE 47 BRAZIL: BUTADIENE MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 48 ABS: PROPERTIES

TABLE 49 ABS: MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 50 ABS: MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 51 ABS: MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 52 NORTH AMERICA: ABS MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 53 NORTH AMERICA: ABS MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 54 EUROPE: ABS MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 55 EUROPE: ABS MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 56 ASIA-PACIFIC: ABS MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 57 ASIA-PACIFIC: ABS MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 58 ROW: ABS MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 59 ROW: ABS MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 60 SBR: PROPERTIES

TABLE 61 SBR: MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 62 SBR: MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 63 SBR: MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 64 NORTH AMERICA: SBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 65 NORTH AMERICA: SBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 66 EUROPE: SBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 67 EUROPE: SBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 68 ASIA-PACIFIC: SBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 69 ASIA-PACIFIC: SBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 70 ROW: SBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 71 ROW: SBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 72 PBR: MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 73 PBR: MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 74 PBR: MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 75 NORTH AMERICA: PBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 76 NORTH AMERICA: PBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 77 EUROPE: PBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 78 EUROPE: PBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 79 ASIA-PACIFIC: PBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 80 ASIA-PACIFIC: PBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 81 ROW: PBR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 82 ROW: PBR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 83 SB LATEX: MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 84 SB LATEX: MARKET VOLUME, BY APPLICATION, 2011–2018 (KT)

TABLE 85 SB LATEX: MARKET VALUE, BY APPLICATION, 2011–2018 (\$MILLION)

TABLE 86 NORTH AMERICA: SB LATEX MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 87 NORTH AMERICA: SB LATEX MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 88 EUROPE: SB LATEX MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 89 EUROPE: SB LATEX MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 90 ASIA-PACIFIC: SB LATEX MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 91 ASIA-PACIFIC: SB LATEX MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 92 ROW: SB LATEX MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 93 ROW: SB LATEX MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 94 NR: MARKET VOLUME (KT) & VALUE (\$MILLION), 2011–2018

TABLE 95 NORTH AMERICA: NR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 96 NORTH AMERICA: NR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 97 EUROPE: NR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 98 EUROPE: NR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 99 ASIA-PACIFIC: NR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 100 ASIA-PACIFIC: NR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 101 ROW: NR MARKET VOLUME, BY COUNTRY, 2011–2018 (KT)

TABLE 102 ROW: NR MARKET VALUE, BY COUNTRY, 2011–2018 (\$MILLION)

TABLE 103 ADIPONITRILE: MARKET VOLUME, BY REGION, 2011–2018 (KT)

TABLE 104 ENI: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012 (\$MILLION)

TABLE 105 VERSALIS: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 106 EVONIK: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 107 JSR CORP: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 108 LANXESS: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 109 LG CHEM: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 110 RELIANCE: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 111 REPSOL: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 112 SABIC: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 113 DOW: ANNUAL REVENUE, BY BUSINESS SEGMENT, 2011–2012

(\$MILLION)

TABLE 114 TPC GROUP: ANNUAL REVENUE, BY BUSINESS SEGMENT,
2010–2011 (\$MILLION)

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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