

1, 4 Butanediol Market Outlook 2025-2034: Market Share, and Growth Analysis By Type (Synthetic, Bio Based), By Application (Tetrahydrofuran (THF), Polybutylene Terephthalate (PBT), Gamma Butyrolactone (GBL), Polyurethane (PU), Others), By End-Use

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Abstracts

The 1, 4 Butanediol Market is valued at USD 8.9 billion in 2025 and is projected to grow at a CAGR of 10% to reach USD 21 billion by 2034. The global 1,4-Butanediol (BDO) market is experiencing significant growth due to its widespread applications across multiple industries, including chemicals, pharmaceuticals, textiles, and automotive. As a key intermediate chemical, 1,4-Butanediol is used in the production of tetrahydrofuran (THF), polybutylene terephthalate (PBT), and gamma-butyrolactone (GBL), which are essential components in the manufacturing of plastics, fibers, and solvents. The increasing demand for high-performance engineering plastics and spandex fibers in the textile and automotive sectors is driving market expansion. Additionally, the shift toward bio-based production methods is gaining traction, as companies seek sustainable alternatives to traditional petrochemical-based BDO production. With growing environmental concerns, regulatory bodies are encouraging the adoption of greener production technologies, fostering innovation in the industry. The market's growth is further supported by increasing industrialization in emerging economies and rising investments in research and development to enhance production efficiency and expand application scope.

The 1,4-Butanediol market witnessed notable advancements driven by sustainability initiatives, supply chain optimizations, and increasing industrial applications. The chemical industry saw a growing shift toward bio-based BDO production, with

companies investing in fermentation and biocatalytic processes to reduce reliance on fossil fuels. Automotive manufacturers increasingly adopted PBT-based components, enhancing vehicle durability and lightweighting strategies to meet fuel efficiency standards. The textiles sector also experienced a surge in demand for spandex, fueled by consumer preferences for stretchable, high-performance fabrics. Supply chain disruptions in previous years prompted manufacturers to invest in regional production facilities, improving logistics efficiency and reducing dependency on imports. The Asia-Pacific region continued to dominate the market, with China and India expanding their BDO production capacities to meet rising domestic and international demand. Meanwhile, regulatory developments around the restriction of hazardous solvents pushed manufacturers to adopt cleaner, more environmentally friendly processes, ensuring compliance with evolving global standards.

The 1,4-Butanediol market is expected to witness continued growth, fueled by advancements in bio-based chemistry, rising demand for high-performance plastics, and expansion in emerging markets. Companies are increasingly focusing on sustainable production routes, with fermentation-based BDO gaining momentum as a viable alternative to traditional petrochemical methods. The automotive industry's shift toward electric vehicles (EVs) will drive further demand for lightweight engineering plastics, where PBT plays a crucial role in battery casings and electronic components. Additionally, the rapid growth of the electronics and consumer goods industries will further propel market expansion. Emerging economies in Southeast Asia, Latin America, and the Middle East will see increased investments in BDO production and downstream applications, driven by industrialization and infrastructure development. However, challenges such as fluctuating raw material prices and stringent environmental regulations will necessitate ongoing innovation and process optimization to ensure long-term sustainability and market competitiveness.

Key Insights 1, 4 Butanediol Market

1. Rise in Bio-Based 1,4-Butanediol Production – As sustainability becomes a key focus, the demand for bio-based BDO is growing rapidly. Companies are investing in fermentation-based production processes using renewable feedstocks to minimize environmental impact. This shift is being driven by stringent environmental regulations and the increasing preference for eco-friendly alternatives in industries such as automotive, textiles, and consumer goods. Bio-based BDO also offers improved biodegradability, aligning with global sustainability initiatives and enhancing the appeal of green chemicals.

2. Growing Demand for High-Performance Plastics – The increasing adoption of lightweight and durable materials in the automotive and electronics industries is boosting demand for BDO-derived products such as PBT. These plastics play a crucial role in improving fuel efficiency, reducing emissions, and enhancing durability. As electric vehicle production rises, the need for advanced engineering plastics in battery enclosures and electronic connectors is expected to grow significantly. Additionally, PBT's role in the packaging and medical industries further strengthens its market position.

1. Expansion of the Automotive and Textile Industries – The rising demand for high-performance materials in automotive and textile applications is driving the growth of the 1,4-Butanediol market. Spandex fibers, made from BDO derivatives, are witnessing strong demand in the sportswear and fashion industries. In the automotive sector, the push for fuel efficiency and lightweight materials is increasing the use of PBT components, particularly in electric vehicles. These industry trends are expected to support long-term BDO market growth.

2. Industrial Growth in Emerging Markets – Rapid industrialization in Asia-Pacific, Latin America, and the Middle East is fueling the expansion of the BDO market. Governments in these regions are investing in chemical manufacturing infrastructure, encouraging local production and reducing import dependency. Additionally, increasing consumer demand for advanced materials in packaging, electronics, and medical applications is contributing to market growth. These factors collectively strengthen the global footprint of BDO and its derivative products.

Fluctuating Raw Material Prices and Regulatory Constraints – The 1,4-Butanediol market is highly sensitive to fluctuations in raw material costs, particularly for petroleum-derived feedstocks. Volatile crude oil prices impact production expenses, creating pricing uncertainties. Additionally, stringent environmental regulations on solvent emissions and chemical waste disposal are increasing compliance costs for manufacturers. As a result, companies must invest in sustainable alternatives and process innovations to navigate these challenges effectively while maintaining profitability.

1, 4 Butanediol Market Segmentation

By Type

Synthetic

Bio Based

By Application

Tetrahydrofuran (THF)

Polybutylene Terephthalate (PBT)

Gamma Butyrolactone (GBL)

Polyurethane (PU)

Others

By End-Use

Chemical

Sports

Automotive

Electronic

Footwear

Others

Key Companies Analysed

BASF SE

LyondellBasell Industries N.V.

Dairen Chemical Corporation

Mitsubishi Chemical Group Corporation

INVISTA

Markor Chemical Group

Ashland Global Holdings Inc.

Chang Chun Group

Nan Ya Plastics Corporation

Xinjiang Tianye Group Co., Ltd.

1, 4 Butanediol Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

1, 4 Butanediol Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory

landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — 1, 4 Butanediol market data and outlook to 2034

United States

Canada

Mexico

Europe — 1, 4 Butanediol market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — 1, 4 Butanediol market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — 1, 4 Butanediol market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — 1, 4 Butanediol market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the 1, 4 Butanediol value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data

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triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the 1, 4 Butanediol industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the 1, 4 Butanediol Market Report

Global 1, 4 Butanediol market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on 1, 4 Butanediol trade, costs, and supply chains

1, 4 Butanediol market size, share, and outlook across 5 regions and 27 countries, 2023-2034

1, 4 Butanediol market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term 1, 4 Butanediol market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and 1, 4 Butanediol supply chain analysis

1, 4 Butanediol trade analysis, 1, 4 Butanediol market price analysis, and 1, 4 Butanediol supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest 1, 4 Butanediol market news and developments

Additional Support

With the purchase of this report, you will receive

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Contents

1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

2. GLOBAL 1, 4 BUTANEDIOL MARKET SUMMARY, 2025

- 2.1 1, 4 Butanediol Industry Overview
 - 2.1.1 Global 1, 4 Butanediol Market Revenues (In US\$ billion)
- 2.2 1, 4 Butanediol Market Scope
- 2.3 Research Methodology

3. 1, 4 BUTANEDIOL MARKET INSIGHTS, 2024-2034

- 3.1 1, 4 Butanediol Market Drivers
- 3.2 1, 4 Butanediol Market Restraints
- 3.3 1, 4 Butanediol Market Opportunities
- 3.4 1, 4 Butanediol Market Challenges
- 3.5 Tariff Impact on Global 1, 4 Butanediol Supply Chain Patterns

4. 1, 4 BUTANEDIOL MARKET ANALYTICS

- 4.1 1, 4 Butanediol Market Size and Share, Key Products, 2025 Vs 2034
- 4.2 1, 4 Butanediol Market Size and Share, Dominant Applications, 2025 Vs 2034
- 4.3 1, 4 Butanediol Market Size and Share, Leading End Uses, 2025 Vs 2034
- 4.4 1, 4 Butanediol Market Size and Share, High Growth Countries, 2025 Vs 2034
- 4.5 Five Forces Analysis for Global 1, 4 Butanediol Market
 - 4.5.1 1, 4 Butanediol Industry Attractiveness Index, 2025
 - 4.5.2 1, 4 Butanediol Supplier Intelligence
 - 4.5.3 1, 4 Butanediol Buyer Intelligence
 - 4.5.4 1, 4 Butanediol Competition Intelligence
 - 4.5.5 1, 4 Butanediol Product Alternatives and Substitutes Intelligence
 - 4.5.6 1, 4 Butanediol Market Entry Intelligence

5. GLOBAL 1, 4 BUTANEDIOL MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034

5.1 World 1, 4 Butanediol Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)

5.1 Global 1, 4 Butanediol Sales Outlook and CAGR Growth By Type, 2024- 2034 (\$ billion)

5.2 Global 1, 4 Butanediol Sales Outlook and CAGR Growth By Application, 2024- 2034 (\$ billion)

5.3 Global 1, 4 Butanediol Sales Outlook and CAGR Growth By End-Use, 2024- 2034 (\$ billion)

5.4 Global 1, 4 Butanediol Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

6. ASIA PACIFIC 1, 4 BUTANEDIOL INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK

6.1 Asia Pacific 1, 4 Butanediol Market Insights, 2025

6.2 Asia Pacific 1, 4 Butanediol Market Revenue Forecast By Type, 2024- 2034 (USD billion)

6.3 Asia Pacific 1, 4 Butanediol Market Revenue Forecast By Application, 2024- 2034 (USD billion)

6.4 Asia Pacific 1, 4 Butanediol Market Revenue Forecast By End-Use, 2024- 2034 (USD billion)

6.5 Asia Pacific 1, 4 Butanediol Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.5.1 China 1, 4 Butanediol Market Size, Opportunities, Growth 2024- 2034

6.5.2 India 1, 4 Butanediol Market Size, Opportunities, Growth 2024- 2034

6.5.3 Japan 1, 4 Butanediol Market Size, Opportunities, Growth 2024- 2034

6.5.4 Australia 1, 4 Butanediol Market Size, Opportunities, Growth 2024- 2034

7. EUROPE 1, 4 BUTANEDIOL MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034

7.1 Europe 1, 4 Butanediol Market Key Findings, 2025

7.2 Europe 1, 4 Butanediol Market Size and Percentage Breakdown By Type, 2024- 2034 (USD billion)

7.3 Europe 1, 4 Butanediol Market Size and Percentage Breakdown By Application, 2024- 2034 (USD billion)

7.4 Europe 1, 4 Butanediol Market Size and Percentage Breakdown By End-Use, 2024- 2034 (USD billion)

7.5 Europe 1, 4 Butanediol Market Size and Percentage Breakdown by Country, 2024-

2034 (USD billion)

7.5.1 Germany 1, 4 Butanediol Market Size, Trends, Growth Outlook to 2034

7.5.2 United Kingdom 1, 4 Butanediol Market Size, Trends, Growth Outlook to 2034

7.5.2 France 1, 4 Butanediol Market Size, Trends, Growth Outlook to 2034

7.5.2 Italy 1, 4 Butanediol Market Size, Trends, Growth Outlook to 2034

7.5.2 Spain 1, 4 Butanediol Market Size, Trends, Growth Outlook to 2034

8. NORTH AMERICA 1, 4 BUTANEDIOL MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034

8.1 North America Snapshot, 2025

8.2 North America 1, 4 Butanediol Market Analysis and Outlook By Type, 2024- 2034 (\$ billion)

8.3 North America 1, 4 Butanediol Market Analysis and Outlook By Application, 2024-2034 (\$ billion)

8.4 North America 1, 4 Butanediol Market Analysis and Outlook By End-Use, 2024-2034 (\$ billion)

8.5 North America 1, 4 Butanediol Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)

8.5.1 United States 1, 4 Butanediol Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Canada 1, 4 Butanediol Market Size, Share, Growth Trends and Forecast, 2024-2034

8.5.1 Mexico 1, 4 Butanediol Market Size, Share, Growth Trends and Forecast, 2024-2034

9. SOUTH AND CENTRAL AMERICA 1, 4 BUTANEDIOL MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS

9.1 Latin America 1, 4 Butanediol Market Data, 2025

9.2 Latin America 1, 4 Butanediol Market Future By Type, 2024- 2034 (\$ billion)

9.3 Latin America 1, 4 Butanediol Market Future By Application, 2024- 2034 (\$ billion)

9.4 Latin America 1, 4 Butanediol Market Future By End-Use, 2024- 2034 (\$ billion)

9.5 Latin America 1, 4 Butanediol Market Future by Country, 2024- 2034 (\$ billion)

9.5.1 Brazil 1, 4 Butanediol Market Size, Share and Opportunities to 2034

9.5.2 Argentina 1, 4 Butanediol Market Size, Share and Opportunities to 2034

10. MIDDLE EAST AFRICA 1, 4 BUTANEDIOL MARKET OUTLOOK AND GROWTH PROSPECTS

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa 1, 4 Butanediol Market Statistics By Type, 2024- 2034 (USD billion)

10.3 Middle East Africa 1, 4 Butanediol Market Statistics By Application, 2024- 2034 (USD billion)

10.4 Middle East Africa 1, 4 Butanediol Market Statistics By End-Use, 2024- 2034 (USD billion)

10.5 Middle East Africa 1, 4 Butanediol Market Statistics by Country, 2024- 2034 (USD billion)

10.5.1 Middle East 1, 4 Butanediol Market Value, Trends, Growth Forecasts to 2034

10.5.2 Africa 1, 4 Butanediol Market Value, Trends, Growth Forecasts to 2034

11. 1, 4 BUTANEDIOL MARKET STRUCTURE AND COMPETITIVE LANDSCAPE

11.1 Key Companies in 1, 4 Butanediol Industry

11.2 1, 4 Butanediol Business Overview

11.3 1, 4 Butanediol Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

12 APPENDIX

12.1 Global 1, 4 Butanediol Market Volume (Tons)

12.1 Global 1, 4 Butanediol Trade and Price Analysis

12.2 1, 4 Butanediol Parent Market and Other Relevant Analysis

12.3 Publisher Expertise

12.2 1, 4 Butanediol Industry Report Sources and Methodology

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