

Polybutadiene (Br) Market Outlook 2025-2034: Market Share, and Growth Analysis By Product Type (Solid Polybutadiene, Liquid Polybutadiene), By Sales (Online, Offline), By Industry Vertical

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Abstracts

The Polybutadiene (Br) Market is valued at USD 22.8 billion in 2025 and is projected to grow at a CAGR of 8% to reach USD 45.6 billion by 2034.

Polybutadiene (BR) Market Overview

The polybutadiene (BR) market is experiencing steady growth, driven by increasing demand across industries such as automotive, tire manufacturing, and industrial rubber applications. Polybutadiene, a synthetic rubber known for its high elasticity, abrasion resistance, and low rolling resistance, is widely used in tire production to enhance fuel efficiency and durability. The automotive sector remains the largest consumer of BR, with growing vehicle production and stringent fuel efficiency regulations further fueling market expansion. Additionally, the rising adoption of polybutadiene in industrial applications such as conveyor belts, hoses, and footwear has contributed to market growth. The expansion of the electric vehicle (EV) sector is also driving demand for high-performance tires, where BR plays a critical role in improving grip and energy efficiency. As industries seek materials with enhanced durability and sustainability, polybutadiene manufacturers are focusing on innovations in production processes, recycling, and bio-based alternatives to align with global sustainability initiatives. The polybutadiene market witnessed significant advancements in production technologies, sustainability efforts, and regional market expansion. The growing focus on eco-friendly rubber formulations led to the development of bio-based and recycled polybutadiene, reducing dependence on petroleum-derived materials. Tire manufacturers prioritized BR grades with improved rolling resistance and wear performance to meet fuel efficiency and

sustainability targets. Additionally, investment in neodymium-catalyzed polybutadiene (Nd-BR) gained momentum due to its superior mechanical properties and enhanced energy efficiency, making it a preferred choice in premium tire applications. The Asia-Pacific region continued to dominate the market, driven by rapid industrialization, increasing automobile sales, and expanding infrastructure projects. Meanwhile, fluctuating raw material prices and supply chain disruptions posed challenges, prompting manufacturers to explore alternative feedstocks and regional sourcing strategies to stabilize production costs. The polybutadiene market is expected to evolve with further advancements in sustainable production, technological innovations, and expanding applications in emerging industries. The push for green mobility will drive increased adoption of BR in EV tires, where enhanced performance characteristics such as reduced rolling resistance and higher energy efficiency are critical. Research into advanced polymerization techniques and hybrid rubber formulations will lead to the development of high-performance BR grades with improved resilience and longer lifespan. Additionally, the integration of circular economy principles, including rubber recycling and closed-loop manufacturing processes, will play a key role in addressing environmental concerns. As regulatory frameworks become more stringent, particularly concerning carbon emissions and sustainable materials, companies will continue investing in R&D to develop low-emission BR production methods. With increasing global demand for durable and high-performance synthetic rubber, the polybutadiene market is poised for continued expansion driven by innovation and sustainability.

Key Insights Polybutadiene (Br) Market

Shift Toward Bio-Based and Recycled Polybutadiene: Rising environmental concerns are prompting manufacturers to develop sustainable BR alternatives using bio-based raw materials and recycled rubber.

Increased Adoption of Nd-BR in High-Performance Tires: Neodymium-catalyzed polybutadiene is gaining popularity due to its superior durability, reduced rolling resistance, and enhanced fuel efficiency benefits.

Advancements in Green Tire Manufacturing Technologies: The growing demand for eco-friendly tires is driving innovations in BR formulations that improve energy efficiency and reduce environmental impact.

Expansion of BR Applications in Non-Tire Sectors: Increasing use of polybutadiene in industrial products such as belts, footwear, and golf balls is

diversifying market opportunities beyond the automotive sector.

Integration of Circular Economy Principles in Rubber Manufacturing: Companies are investing in rubber recycling technologies and closed-loop production processes to minimize waste and enhance sustainability.

Growing Demand from the Automotive and Tire Industry: The rising production of vehicles and demand for fuel-efficient tires are driving BR consumption globally.

Regulatory Push for Low-Emission and Sustainable Materials: Governments and regulatory bodies are implementing stricter environmental standards, encouraging the adoption of eco-friendly BR production techniques.

Rapid Industrialization in Emerging Markets: Expanding industrial activities in Asia-Pacific and Latin America are increasing demand for BR in construction, packaging, and consumer goods.

Advancements in Polymerization and Catalyst Technologies: Innovations in rubber synthesis, such as improved catalysts and polymerization processes, are enhancing the performance and efficiency of BR.

Volatility in Raw Material Prices and Supply Chain Disruptions: Fluctuations in the cost of butadiene, along with supply chain constraints, pose challenges for manufacturers in maintaining stable production and pricing.

Polybutadiene (Br) Market Segmentation

By Product Type

Solid Polybutadiene

Liquid Polybutadiene

By Sales

Online

Offline

By Industry Vertical

Tire

Automotive

Chemical

Industry Rubber Manufacturing (Other Industry Verticals)

Key Companies Analysed

LG Chem Ltd.

Versalis SPA

China Petroleum & Chemical Corporation

JSR Corporation

Reliance Industries Limited

Lanxess AG

Kumho Petrochemical Co. Ltd.

Goodyear Tire & Rubber Company

UBE Industries Ltd.

Synthos SA

Evonik Industries AG

LyondellBasell Industries NV

Zeon Corporation

Nizhnekamskneftekhim

Firestone Polymers LLC

SIBUR International GmbH

Arlanxeo

China National Petroleum Corporation

PetroChina Company Limited

Formosa Petrochemical Corporation

Indian Synthetic Rubber Limited

Asahi Kasei Corporation

Sumitomo Chemical Co. Ltd.

Saudi Aramco

Saudi Arabia's Basic Industries Corporation

Kuraray Co. Ltd.

Polybutadiene (Br) 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.

Polybutadiene (Br) 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 — Polybutadiene (Br) market data and outlook to 2034

United States

Canada

Mexico

Europe — Polybutadiene (Br) market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Polybutadiene (Br) market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Polybutadiene (Br) market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Polybutadiene (Br) 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 Polybutadiene (Br) value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data 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 Polybutadiene (Br) 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 Polybutadiene (Br) Market Report

Global Polybutadiene (Br) market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Polybutadiene (Br) trade, costs, and supply chains

Polybutadiene (Br) market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Polybutadiene (Br) market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Polybutadiene (Br) market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Polybutadiene (Br) supply chain analysis

Polybutadiene (Br) trade analysis, Polybutadiene (Br) market price analysis, and Polybutadiene (Br) supply/demand dynamics

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

Latest Polybutadiene (Br) market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

Contents

1. TABLE OF CONTENTS

- 1.1 List of Tables
- 1.2 List of Figures

2. GLOBAL POLYBUTADIENE (BR) MARKET SUMMARY, 2025

- 2.1 Polybutadiene (Br) Industry Overview
 - 2.1.1 Global Polybutadiene (Br) Market Revenues (In US\$ billion)
- 2.2 Polybutadiene (Br) Market Scope
- 2.3 Research Methodology

3. POLYBUTADIENE (BR) MARKET INSIGHTS, 2024-2034

- 3.1 Polybutadiene (Br) Market Drivers
- 3.2 Polybutadiene (Br) Market Restraints
- 3.3 Polybutadiene (Br) Market Opportunities
- 3.4 Polybutadiene (Br) Market Challenges
- 3.5 Tariff Impact on Global Polybutadiene (Br) Supply Chain Patterns

4. POLYBUTADIENE (BR) MARKET ANALYTICS

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

5. GLOBAL POLYBUTADIENE (BR) MARKET STATISTICS – INDUSTRY REVENUE, MARKET SHARE, GROWTH TRENDS AND FORECAST BY SEGMENTS, TO 2034

5.1 World Polybutadiene (Br) Market Size, Potential and Growth Outlook, 2024- 2034 (\$ billion)

5.1 Global Polybutadiene (Br) Sales Outlook and CAGR Growth By Product Type, 2024- 2034 (\$ billion)

5.2 Global Polybutadiene (Br) Sales Outlook and CAGR Growth By Sales, 2024- 2034 (\$ billion)

5.3 Global Polybutadiene (Br) Sales Outlook and CAGR Growth By Industry Vertical, 2024- 2034 (\$ billion)

5.4 Global Polybutadiene (Br) Market Sales Outlook and Growth by Region, 2024- 2034 (\$ billion)

6. ASIA PACIFIC POLYBUTADIENE (BR) INDUSTRY STATISTICS – MARKET SIZE, SHARE, COMPETITION AND OUTLOOK

6.1 Asia Pacific Polybutadiene (Br) Market Insights, 2025

6.2 Asia Pacific Polybutadiene (Br) Market Revenue Forecast By Product Type, 2024- 2034 (USD billion)

6.3 Asia Pacific Polybutadiene (Br) Market Revenue Forecast By Sales, 2024- 2034 (USD billion)

6.4 Asia Pacific Polybutadiene (Br) Market Revenue Forecast By Industry Vertical, 2024- 2034 (USD billion)

6.5 Asia Pacific Polybutadiene (Br) Market Revenue Forecast by Country, 2024- 2034 (USD billion)

6.5.1 China Polybutadiene (Br) Market Size, Opportunities, Growth 2024- 2034

6.5.2 India Polybutadiene (Br) Market Size, Opportunities, Growth 2024- 2034

6.5.3 Japan Polybutadiene (Br) Market Size, Opportunities, Growth 2024- 2034

6.5.4 Australia Polybutadiene (Br) Market Size, Opportunities, Growth 2024- 2034

7. EUROPE POLYBUTADIENE (BR) MARKET DATA, PENETRATION, AND BUSINESS PROSPECTS TO 2034

7.1 Europe Polybutadiene (Br) Market Key Findings, 2025

7.2 Europe Polybutadiene (Br) Market Size and Percentage Breakdown By Product Type, 2024- 2034 (USD billion)

7.3 Europe Polybutadiene (Br) Market Size and Percentage Breakdown By Sales, 2024- 2034 (USD billion)

7.4 Europe Polybutadiene (Br) Market Size and Percentage Breakdown By Industry Vertical, 2024- 2034 (USD billion)

7.5 Europe Polybutadiene (Br) Market Size and Percentage Breakdown by Country,

2024- 2034 (USD billion)

7.5.1 Germany Polybutadiene (Br) Market Size, Trends, Growth Outlook to 2034

7.5.2 United Kingdom Polybutadiene (Br) Market Size, Trends, Growth Outlook to 2034

7.5.2 France Polybutadiene (Br) Market Size, Trends, Growth Outlook to 2034

7.5.2 Italy Polybutadiene (Br) Market Size, Trends, Growth Outlook to 2034

7.5.2 Spain Polybutadiene (Br) Market Size, Trends, Growth Outlook to 2034

8. NORTH AMERICA POLYBUTADIENE (BR) MARKET SIZE, GROWTH TRENDS, AND FUTURE PROSPECTS TO 2034

8.1 North America Snapshot, 2025

8.2 North America Polybutadiene (Br) Market Analysis and Outlook By Product Type, 2024- 2034 (\$ billion)

8.3 North America Polybutadiene (Br) Market Analysis and Outlook By Sales, 2024- 2034 (\$ billion)

8.4 North America Polybutadiene (Br) Market Analysis and Outlook By Industry Vertical, 2024- 2034 (\$ billion)

8.5 North America Polybutadiene (Br) Market Analysis and Outlook by Country, 2024- 2034 (\$ billion)

8.5.1 United States Polybutadiene (Br) Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Canada Polybutadiene (Br) Market Size, Share, Growth Trends and Forecast, 2024- 2034

8.5.1 Mexico Polybutadiene (Br) Market Size, Share, Growth Trends and Forecast, 2024- 2034

9. SOUTH AND CENTRAL AMERICA POLYBUTADIENE (BR) MARKET DRIVERS, CHALLENGES, AND FUTURE PROSPECTS

9.1 Latin America Polybutadiene (Br) Market Data, 2025

9.2 Latin America Polybutadiene (Br) Market Future By Product Type, 2024- 2034 (\$ billion)

9.3 Latin America Polybutadiene (Br) Market Future By Sales, 2024- 2034 (\$ billion)

9.4 Latin America Polybutadiene (Br) Market Future By Industry Vertical, 2024- 2034 (\$ billion)

9.5 Latin America Polybutadiene (Br) Market Future by Country, 2024- 2034 (\$ billion)

9.5.1 Brazil Polybutadiene (Br) Market Size, Share and Opportunities to 2034

9.5.2 Argentina Polybutadiene (Br) Market Size, Share and Opportunities to 2034

10. MIDDLE EAST AFRICA POLYBUTADIENE (BR) MARKET OUTLOOK AND GROWTH PROSPECTS

10.1 Middle East Africa Overview, 2025

10.2 Middle East Africa Polybutadiene (Br) Market Statistics By Product Type, 2024-2034 (USD billion)

10.3 Middle East Africa Polybutadiene (Br) Market Statistics By Sales, 2024- 2034 (USD billion)

10.4 Middle East Africa Polybutadiene (Br) Market Statistics By Industry Vertical, 2024-2034 (USD billion)

10.5 Middle East Africa Polybutadiene (Br) Market Statistics by Country, 2024- 2034 (USD billion)

10.5.1 Middle East Polybutadiene (Br) Market Value, Trends, Growth Forecasts to 2034

10.5.2 Africa Polybutadiene (Br) Market Value, Trends, Growth Forecasts to 2034

11. POLYBUTADIENE (BR) MARKET STRUCTURE AND COMPETITIVE LANDSCAPE

11.1 Key Companies in Polybutadiene (Br) Industry

11.2 Polybutadiene (Br) Business Overview

11.3 Polybutadiene (Br) Product Portfolio Analysis

11.4 Financial Analysis

11.5 SWOT Analysis

12 APPENDIX

12.1 Global Polybutadiene (Br) Market Volume (Tons)

12.1 Global Polybutadiene (Br) Trade and Price Analysis

12.2 Polybutadiene (Br) Parent Market and Other Relevant Analysis

12.3 Publisher Expertise

12.2 Polybutadiene (Br) Industry Report Sources and Methodology

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