

# 1-Butene Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### 1-Butene Market Summary

The global 1-butene market is positioned as a specialized segment of the linear alpha olefins (LAO) industry. As an important co-monomer and intermediate, 1-butene plays a pivotal role in the production of polyethylene, poly(1-butene), oxo-alcohols, and other derivatives that are widely used across packaging, consumer goods, automotive, construction, and detergent sectors. By 2025, the market is estimated to reach between USD 1.9 and 3.8 billion, expanding at a compound annual growth rate (CAGR) of approximately 1.2% to 2.5% through 2030. This modest yet steady growth reflects the mature but evolving demand base, driven by polymer applications and the structural changes within the global petrochemical industry.

### Characteristics of the Product and Industry

1-butene is a linear alpha olefin (LAO), a group of compounds produced predominantly through ethylene oligomerization and, to a lesser extent, by steam cracking of naphtha or other hydrocarbons. It is primarily valued for its role as a co-monomer in the production of linear low-density polyethylene (LLDPE) and high-density polyethylene (HDPE). In these applications, the addition of 1-butene improves mechanical properties, processing characteristics, and product performance. For instance, in HDPE production, the average co-monomer content of alpha-olefins like 1-butene is around 1–2%, while in LLDPE, it ranges from 8–10%. These levels directly impact the density, crystallinity, flexibility, and durability of the polymer.

The industry is also shaped by substitution dynamics among different alpha olefins.

While 1-butene has historically dominated as the co-monomer in LLDPE and HDPE, a gradual shift toward higher-carbon alpha olefins such as 1-hexene and 1-octene has emerged. These provide superior tensile strength, tear resistance, and durability, positioning them as preferred inputs for high-performance polyethylene resins used in specialty applications like thin films, blow molding, and pipes. Despite this trend, 1-butene continues to command substantial demand due to its availability, lower production costs, and suitability for a broad range of general-purpose polyethylene applications.

Beyond polyethylene, 1-butene is used as a monomer in the production of poly(1-butene), a specialty polymer with applications in packaging films, hot water pipes, and medical devices. Another important outlet is oxo-alcohol production, where 1-butene serves as a feedstock for butanols, key intermediates in plasticizers and surfactants that are widely applied in detergents and coatings.

## Market Size and Growth Outlook

The global 1-butene market is expected to grow moderately, with 2025 values ranging from USD 1.9 billion to 3.8 billion. Growth will be sustained by polyethylene applications, which remain the largest consumer segment, and by steady demand from oxo-alcohols. The CAGR is estimated between 1.2% and 2.5% through 2030, reflecting a stable but not high-growth trajectory, consistent with the broader maturity of the polyethylene market.

## Regional Market Trends

**North America:** Growth in North America is expected to remain modest, supported by shale-gas-based ethylene and LAO production. The United States, with major players such as Chevron Phillips Chemical and TPC Group, maintains a competitive advantage due to low-cost feedstock. Demand from the packaging and consumer goods sectors will provide stability, though substitution by higher alpha-olefins limits upside potential.

**Europe:** Europe represents a more mature market with slower growth. Countries like Germany, Italy, and France have a solid base of polyethylene consumption, but stricter environmental regulations and slower industrial expansion restrain market growth. Eni and Evonik Industries are notable regional producers with established supply chains. The ongoing energy transition and efforts toward recycling-based polyethylene production could

impact demand for 1-butene in the longer term.

**Asia-Pacific:** The Asia-Pacific region, led by China and India, is projected to record the fastest growth. China in particular has aggressively expanded its petrochemical capacities, with companies such as Sinopec, CNPC, CNOOC, and Zhejiang Petroleum & Chemical Co. Ltd. (ZPC) increasing LAO and derivative output. India, supported by PTT Global Chemical and Sumitomo Chemical's regional presence, also offers strong potential. The expansion of packaging, construction, and consumer product markets in Asia-Pacific supports robust consumption of polyethylene and thus demand for 1-butene.

**Latin America:** Growth in Latin America will remain moderate, driven primarily by Brazil and Mexico. Industrial development and packaging demand support incremental increases in 1-butene consumption, but supply is often reliant on imports from North America and Asia-Pacific.

**Middle East and Africa (MEA):** MEA has become a growing production hub for petrochemicals, supported by low-cost feedstock and strategic investments in alpha-olefin projects. However, local demand remains relatively small compared with Asia-Pacific or North America, with most of the output targeted for export. The Middle East in particular is expected to play a more prominent role in global supply.

## Application Analysis

### 1. Polyethylene (LLDPE and HDPE):

The largest application segment, consuming the majority of global 1-butene production.

Expected CAGR: 1.3%–2.4% through 2030.

Growth is linked to packaging films, containers, pipes, and agricultural films. However, substitution with 1-hexene and 1-octene is increasing in high-performance polyethylene applications, especially in premium-grade films and specialty resins.

## 2. Poly(1-butene):

Niche application with specialized demand in hot water pipe systems, medical devices, and packaging.

Expected CAGR: 1.0%–2.0%.

While volumes are smaller compared with polyethylene, growth is supported by demand for advanced materials with heat resistance and durability.

## 3. Oxo-alcohols:

Important outlet for 1-butene in the production of plasticizers and surfactants.

Expected CAGR: 1.1%–2.2%.

The detergent industry in Asia-Pacific, particularly in China and India, sustains steady demand.

## 4. Others:

Includes specialty chemicals, adhesives, and elastomers.

Growth remains modest, with demand tied to niche industrial uses.

## Company Profiles

**Chevron Phillips Chemical:** A leading global producer of alpha olefins, including 1-butene, with significant assets in the United States. Strong integration with polyethylene production supports its competitive advantage.

**TPC Group:** A North American company specializing in C4-based petrochemicals, including 1-butene. Plays a critical role in supplying feedstock to downstream polymer and chemical industries.

**Eni:** An Italian energy and chemical major with a presence in alpha olefin production. Strong focus on European markets, with a growing emphasis on sustainability and renewable-based solutions.

**Evonik Industries:** A German specialty chemicals company active in the alpha-olefin value chain. Its diversified portfolio includes high-performance materials where 1-butene derivatives play a role.

**Arcanum Infrastructure:** Operates production capacity of around 100,000 tons per year, primarily in North America. Its output supports downstream polyethylene and specialty chemical sectors.

**Sinopec, CNPC, CNOOC, and Zhejiang Petroleum & Chemical (ZPC):** These Chinese players collectively represent the largest regional production base, serving the rapidly growing domestic polyethylene and chemical markets. ZPC, in particular, has expanded aggressively with integrated refining-petrochemical complexes.

**Ningxia Baofeng Energy Group:** In June 2025, it announced a new 250,000 tons/year project for 1-butene production from C4 streams, reflecting China's drive for self-sufficiency in critical intermediates.

**PTT Global Chemical, Sumitomo Chemical, Shell Chemical:** These companies contribute to production and supply chains across Asia-Pacific and globally, leveraging integrated operations.

## Industry Value Chain Analysis

The 1-butene value chain can be divided into several key stages:

### 1. Feedstock Supply:

The primary feedstock is ethylene, produced via steam cracking of naphtha, ethane, or other hydrocarbons. In North America, shale gas provides a cost advantage in ethane-based cracking, whereas in Asia and Europe, naphtha-based routes dominate. C4 streams from naphtha cracking are another important source of 1-butene.

## 2. Production of 1-Butene:

The two main production technologies are:

Ethylene oligomerization, where ethylene molecules are catalytically linked to form higher alpha olefins, including 1-butene.

Separation from C4 streams, where 1-butene is isolated from butadiene and other C4 components through extraction and purification processes.

Global producers are increasingly investing in on-purpose 1-butene units using oligomerization technology to meet growing demand and reduce dependence on C4 co-products.

## 3. Distribution and Logistics:

1-butene, being a volatile liquid, requires careful storage and transportation infrastructure. Specialized tanks, pipelines, and shipping facilities are essential. Regional hubs in North America, Europe, and Asia-Pacific facilitate both domestic consumption and international trade.

## 4. Downstream Conversion:

The majority of 1-butene is consumed in polyethylene production, integrated with large-scale petrochemical complexes. Producers with vertical integration (e.g., Chevron Phillips Chemical, Sinopec, ZPC) have cost and supply chain advantages.

Other downstream processes include polymerization into poly(1-butene) and conversion into oxo-alcohols, which are further processed into plasticizers and surfactants.

## 5. End-Use Sectors:

**Packaging:** Films, containers, and wraps made from LLDPE and HDPE.

**Construction:** Pipes, geomembranes, and sheets.

**Consumer Products:** Household containers, toys, detergent surfactants.

**Industrial and Specialty Applications:** Adhesives, elastomers, and medical-grade polymers.

The value chain is increasingly influenced by shifts in technology, feedstock availability, and sustainability requirements. Producers with integrated operations across the chain—from ethylene to polyethylene—are best positioned to capture value.

## Opportunities and Challenges

### Opportunities:

**Packaging Growth in Asia-Pacific:** Rising consumption of packaged food, e-commerce, and consumer products drives polyethylene demand, ensuring continued reliance on 1-butene as a co-monomer.

**Shift to On-Purpose Production:** The move toward ethylene oligomerization technology offers producers greater control over output and quality, reducing dependence on fluctuating C4 co-products.

**Sustainability and Recycling:** The circular economy and plastic recycling initiatives create demand for higher-quality resins, indirectly sustaining demand for 1-butene in certain applications.

**Emerging Market Expansion:** Countries like India, Indonesia, and Vietnam offer strong demand growth for polyethylene and detergents, creating downstream opportunities for 1-butene.

### Challenges:

**Substitution by Higher Alpha Olefins:** The gradual shift toward 1-hexene and 1-octene in premium polyethylene resins poses a structural challenge to 1-butene demand growth.

**Feedstock Volatility:** Dependence on ethylene and C4 availability exposes producers to fluctuations in crude oil and natural gas markets.

**Regulatory Pressure:** Environmental regulations, particularly in Europe, targeting plastics usage and single-use packaging, may reduce demand growth for polyethylene and indirectly for 1-butene.

**Overcapacity Risks in Asia:** Aggressive capacity additions, particularly in China, could lead to oversupply and margin pressure for global producers.

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