

# 1,4-Butynediol Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### 1,4-Butynediol Market Summary

1,4-Butynediol stands as a critical specialty chemical intermediate in the global chemical industry, serving as a fundamental building block for numerous downstream applications. This alkyne-containing diol exhibits exceptional versatility in organic synthesis, functioning both as a high-performance solvent and a key precursor for various industrial chemicals. The compound's unique triple bond structure enables diverse chemical transformations, making it indispensable in manufacturing 1,4-butanediol, 1,4-butenediol, and other valuable organic intermediates. The global 1,4-Butynediol market demonstrates steady growth momentum, with the market size estimated at approximately 50-100 million USD in 2025. Industry analysis indicates the market is expected to expand at a compound annual growth rate (CAGR) of 2.8%-4.8% through 2030, reflecting the compound's essential role in specialized chemical manufacturing and emerging applications in advanced materials production.

### Regional Market Dynamics

The Asia-Pacific region dominates the global 1,4-Butynediol market, accounting for the majority of both production capacity and consumption. China emerges as the primary market driver, hosting significant manufacturing facilities and experiencing robust demand from downstream chemical processing industries. The region's growth trajectory benefits from expanding pharmaceutical manufacturing, electronics production, and specialty chemical processing capabilities.

North America and Europe represent mature markets with stable demand patterns,

primarily driven by pharmaceutical intermediate production and specialty chemical applications. These regions demonstrate growth rates of 2.0%-3.5% annually, supported by stringent quality requirements and advanced manufacturing technologies. The European market particularly emphasizes high-purity grades for pharmaceutical applications, while North American demand centers on electronic chemical applications and advanced material production.

Emerging markets in Latin America and the Middle East show promising growth potential, with estimated annual growth rates of 3.5%-5.0%, driven by expanding chemical processing capabilities and increasing industrial development. However, these regions currently represent smaller market shares due to limited manufacturing infrastructure and technical expertise requirements.

### Application Segments and Growth Patterns

The 1,4-butanediol production segment represents the largest application area, accounting for approximately 40%-50% of total 1,4-Butynediol consumption. This application demonstrates steady growth at 2.5%-4.0% annually, driven by increasing demand for polyurethanes, plasticizers, and high-performance polymers. The segment benefits from the expanding automotive and construction industries, where 1,4-butanediol derivatives find extensive applications in coatings, adhesives, and composite materials.

The 1,4-butanediol production segment exhibits higher growth potential at 3.5%-5.5% annually, fueled by pharmaceutical industry expansion and specialty chemical requirements. This application particularly benefits from vitamin B6 production, where 1,4-butanediol serves as a crucial intermediate, supporting the growing nutraceutical and pharmaceutical markets globally.

Electroplating bath additives represent a specialized but significant application segment, growing at 2.0%-3.5% annually. The segment's growth correlates with electronics manufacturing expansion, particularly in Asia-Pacific markets, where 1,4-Butynediol functions as a brightening agent in nickel plating processes. The increasing demand for high-quality electronic components and automotive parts drives consistent demand in this segment.

Other applications, including corrosion inhibitors and specialized solvents, demonstrate moderate growth at 2.5%-4.0% annually, supported by diverse industrial applications and emerging uses in advanced material production.

## Key Market Players and Industry Structure

BASF maintains a leading position in the global 1,4-Butynediol market, leveraging its extensive chemical expertise and global distribution network. The company's integrated production capabilities and strong research and development infrastructure enable it to serve diverse market segments with high-quality products and technical support.

Dezhou Tianyu Chemical Industry Co. Ltd. operates with a production capacity of 2,000 tons annually, focusing primarily on the Chinese domestic market and regional export opportunities. The company emphasizes cost-effective production methods and maintains strong relationships with downstream chemical processors in the Asia-Pacific region.

Shandong Donge Fengle Chemicals Co. Ltd. contributes 700 tons of annual production capacity, specializing in pharmaceutical-grade 1,4-Butynediol for vitamin B6 production and other high-purity applications. The company's focus on quality control and regulatory compliance positions it well in the growing pharmaceutical intermediate market.

Henan Haiyuan Fine Chemical Co. Ltd. represents the largest dedicated production capacity at 6,000 tons annually, serving both domestic and international markets. The company's substantial production scale enables competitive pricing while maintaining quality standards for various industrial applications.

The industry is experiencing significant capacity expansion, with several major projects under development. Henan Yueda Technology Development Co. Ltd commenced construction of a 20,000-ton 1,4-Butynediol facility in 2024, with production expected to begin in 2026. This substantial capacity addition will significantly impact market dynamics and pricing structures.

Inner Mongolia Rongchuang Experimental Chemical Co. Ltd. is developing an integrated production complex featuring 4,000 tons of propargyl alcohol and 8,000 tons of 1,4-Butynediol capacity, with startup planned for late 2025 or early 2026. This integrated approach provides raw material security and cost advantages.

Shanshan Shenglian New Energy Technology Co. Ltd. announced in April 2025 plans for a smaller-scale facility producing 1,200 tons of propargyl alcohol and 2,400 tons of 1,4-Butynediol, targeting specialized applications in the energy sector.

Northeast Pharmaceutical Group participates in the market through its pharmaceutical intermediate operations, focusing on high-purity applications and maintaining strong positions in vitamin B6 production chains.

## Porter Five Forces Analysis

Threat of New Entrants: Moderate to High

The 1,4-Butynediol market faces moderate to high threat from new entrants due to relatively accessible technology and growing demand. However, entry barriers include substantial capital requirements for manufacturing facilities, technical expertise in handling hazardous materials, and regulatory compliance demands. The current capacity expansion trend indicates attractive market conditions for new players.

Bargaining Power of Suppliers: Moderate

Suppliers of raw materials, particularly propargyl alcohol and acetylene derivatives, maintain moderate bargaining power due to limited alternative sources and specialized production requirements. The integrated production strategies adopted by several players aim to reduce supplier dependence and improve cost structures.

Bargaining Power of Buyers: Low to Moderate

Buyers possess limited bargaining power due to the specialized nature of 1,4-Butynediol and limited alternative suppliers. However, large-volume purchasers in pharmaceutical and chemical industries can negotiate favorable terms, particularly for long-term supply agreements.

Threat of Substitutes: Low

The threat of substitutes remains low due to the unique chemical properties of 1,4-Butynediol and its specific applications in downstream chemical synthesis. Alternative synthesis routes for end products may exist but often prove less economical or technically challenging.

#### Competitive Rivalry: Moderate

Competitive rivalry is moderate, characterized by established players competing on quality, technical support, and pricing. The market's specialty chemical nature limits intense price competition, while product differentiation occurs through purity levels and technical service capabilities.

### **Market Opportunities and Challenges**

#### Opportunities

The expanding pharmaceutical industry presents significant growth opportunities, particularly in vitamin B6 production and specialized pharmaceutical intermediates. The increasing global focus on health and nutrition supplements drives consistent demand for high-purity 1,4-Butynediol derivatives.

Advanced materials applications, including lithium battery additives and liquid crystal display components, offer promising growth avenues. The electronics industry's continuous innovation and the global transition toward renewable energy storage create new demand streams for specialized chemical intermediates.

The development of bio-based production methods presents long-term opportunities for sustainable manufacturing, potentially opening new market segments focused on environmental sustainability and reduced carbon footprint.

Regional market expansion in emerging economies provides growth potential as industrial development accelerates and chemical processing capabilities expand. Government investments in industrial infrastructure and technology transfer programs support market development in these regions.

## Challenges

Raw material price volatility poses significant challenges, particularly for acetylene-based feedstocks and propargyl alcohol. Market participants must develop effective hedging strategies and supply chain management capabilities to maintain profitability.

Regulatory compliance requirements continue to increase, particularly in pharmaceutical applications and environmental safety standards. Companies must invest in regulatory expertise and compliance systems to maintain market access.

Environmental regulations and sustainability pressures require investments in cleaner production technologies and waste management systems. The industry faces increasing scrutiny regarding environmental impact and must adapt to evolving regulatory frameworks.

Technical complexity in handling and processing 1,4-Butynediol requires specialized expertise and safety systems, creating barriers for market expansion and limiting potential suppliers. Maintaining adequate technical support capabilities while managing costs remains challenging for industry participants.

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