

n-Butyl Acrylate Global Market Insights 2026, Analysis and Forecast to 2031

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Abstracts

n-Butyl Acrylate Market Summary

Global Market Overview

The global n-Butyl Acrylate (BA) market represents a critical segment of the acrylic esters industry, serving as a fundamental raw material for the production of soft polymers used in coatings, adhesives, and textiles. Chemically identified by CAS No. 141-32-2, n-Butyl Acrylate is produced via the esterification of acrylic acid with n-butanol. It is valued for its ability to impart flexibility, tackiness, and weather resistance to copolymers, thanks to its low glass transition temperature (T_g).

The market is characterized by mature demand in developed economies and rapid capacity expansion in emerging markets, particularly Asia. Driven by the shift from solvent-based to water-based formulations in the paints and coatings industry, the demand for BA continues to grow. Based on current industrial analysis and capacity tracking, the estimated market size for n-Butyl Acrylate is projected to range between 5.1 billion and 8.1 billion USD in 2026. Looking ahead to the long-term horizon, the industry is expected to experience a steady expansion with a Compound Annual Growth Rate (CAGR) estimated between 1.6% and 3.2% through the year 2031.

Product Characteristics and Production Technology

n-Butyl Acrylate is a clear, colorless liquid with a characteristic fruity odor. It is a 'soft monomer,' meaning it is primarily used to lower the glass transition temperature of copolymers, making the final material softer, more flexible, and stickier.

Production Process: The industrial standard involves the direct esterification reaction where Acrylic Acid and n-Butanol are reacted in the presence of a strong acid catalyst (typically sulfuric acid or ion-exchange resins) at elevated temperatures. Water produced during the reaction is removed to drive the equilibrium forward.

Technological Innovation (One-Step Oxidation): A significant development in the industry is the shift toward alternative feedstocks. For instance, the Ningbo Changhong Polymer Scientific and Technical Inc. project represents a technological leap. This 'one-step oxidation' process aims to use propane directly, bypassing the expensive propylene intermediate, to produce acrylic acid, which is then esterified. If commercially successful, this could fundamentally alter the cost structure of the value chain by utilizing cheaper alkane feedstocks.

Regional Market Analysis and Trends

The global capacity for n-Butyl Acrylate is heavily concentrated, with total global capacity exceeding 8 million tons in 2025. The market dynamics vary significantly across regions due to feedstock availability and industrial demand patterns.

Asia-Pacific (APAC)

dominance: APAC is unequivocally the largest production and consumption region globally.

China: As the global powerhouse, China holds the largest single-country capacity. In 2025, China's BA capacity exceeds 4.1 million tons (a significant leap from approximately 2.6 million tons in 2020). Projections indicate continued aggressive expansion, with capacity expected to break 4.3 million tons by 2026. The market is characterized by large, integrated petrochemical complexes.

Japan: The Japanese market is undergoing consolidation and rationalization due to high operating costs and intense competition from Chinese exports. A notable event was the strategic withdrawal of Idemitsu from the acrylic acid and butyl acrylate business in March 2023. Idemitsu exited due to the inability to compete with the surging supplies within Asia, highlighting the pressure on non-integrated or smaller-scale producers.

Other Key Hubs: South Korea, India, Taiwan (China), and Southeast Asia (Singapore, Malaysia, Indonesia) maintain significant production capabilities, serving both domestic demand and export markets.

North America

Position: The second-largest global market.

Drivers: The region benefits from a structural feedstock advantage due to the abundance of shale gas-derived propylene and natural gas. This makes North American producers highly competitive in the export market.

Key Players: The market is oligopolistic, dominated by majors like Dow, BASF, and Arkema, which operate large-scale, vertically integrated sites primarily along the US Gulf Coast.

Europe

Position: The third-largest production and consumption region.

Dynamics: The European market is mature, with a heavy focus on sustainability and regulatory compliance (REACH). There is a strong trend towards developing bio-based acrylates to reduce carbon footprints.

Key Players: BASF, Arkema, and Nippon Shokubai are the central figures. Synthomer also plays a vital role with its production base in Sokolov, Czech Republic.

Middle East and Africa (MEA)

Position: The fourth-largest region.

Dynamics: Production is driven by access to cheap hydrocarbon feedstocks. Tasnee (Saudi Arabia) and Sasol (South Africa) are the primary producers, focusing heavily on exports to Europe and Asia.

South America

Position: The fifth-largest region.

Dynamics: BASF is the dominant local producer with facilities in Brazil, serving the regional automotive and architectural coatings markets.

Application and End-Use Segmentation

n-Butyl Acrylate acts as a versatile building block. Its downstream applications are diverse, ranging from commodity paints to specialized engineering plastics.

Polymer Dispersions (Acrylic Emulsions):

This is the largest consumption sector for BA. It is copolymerized (often with methyl methacrylate or styrene) to produce water-based emulsions.

Paints and Coatings: BA provides the necessary flexibility to architectural paints, preventing cracking on walls that expand and contract with temperature changes. It is essential for exterior, interior, and wood coatings.

Adhesives: In the manufacturing of glues and Pressure Sensitive Adhesives (PSAs), BA provides 'tack.' It is widely used in packaging tapes, labels, and construction adhesives.

Textiles and Non-wovens: Aqueous dispersions are used as binders for non-woven fabrics (wipes, hygiene products) and in textile finishing to improve hand-feel and durability.

Ethylene Butyl Acrylate (EBA) Copolymers:

EBA is a specialized elastomer produced via high-pressure autoclave processes. It offers excellent thermal stability, flexibility at low temperatures, and adhesion to various substrates.

Market Brands: Key commercial products in this niche include Dow ELVALOY[®] AC 3717, SK Functional Polymer LOTRYL[®], Westlake Corporation EBAC[®], and ExxonMobil[®] EnBA.

Usage: EBA is used in packaging films (to improve impact strength), hot melt adhesives, asphalt modification, and wire and cable compounds.

Acrylic Rubber (ACM):

BA is a primary monomer for Polyacrylate Rubber.

Usage: ACM is highly resistant to hot oil and oxidation, making it ideal for automotive components such as transmission seals, gaskets, and hoses where resistance to heat and transmission fluids is required.

Competitive Landscape and Key Players

The global n-Butyl Acrylate market is highly concentrated at the top tier, with a 'Who's Who' of global chemical giants controlling the majority of capacity. However, the mid-tier is becoming increasingly crowded with rapidly expanding Chinese entities.

Tier 1: Super-Scale Leaders (Capacity > 1 Million Tons)

BASF (Germany): The global leader with a vast 'Verbund' integration network. BASF produces BA in Europe, North America, and Asia, ensuring supply security and cost optimization.

Satellite Chemical Co. Ltd. (China): A massive private enterprise in China. Leveraging its integrated Propane Dehydrogenation (PDH) to Acrylic Acid value chain, it has rapidly scaled to become a top global contender with capacity exceeding 1 million tons.

Tier 2: Major Global Producers (Capacity > 500,000 Tons)

Arkema (France): A leading global specialty materials player with significant BA assets in Europe and the USA.

Shanghai Huayi Group (China): A state-owned giant and one of China's earliest and largest acrylic producers.

Dow (USA): A dominant force in North America, heavily integrated into downstream coatings and EBA production.

Wanhua Chemical Group (China): Known for MDI, Wanhua has aggressively expanded into petrochemicals, building substantial acrylic esters capacity.

Formosa Plastics Corp. (Taiwan, China): A key regional supplier with highly integrated refining and chemical operations.

Tier 3: Significant Players (Capacity 200,000 - 400,000 Tons)

LG Chem (South Korea): A major supplier for the Northeast Asian market.

Nippon Shokubai (Japan): A historical leader in acrylics, focusing on high-quality applications despite facing cost pressures in domestic production.

Tier 4: Regional and Niche Producers (Capacity 100,000 - 200,000 Tons)

Sasol (South Africa): Leverages its unique Fischer-Tropsch value chain.

Indian Oil Corporation Limited (IOCL) & Bharat Petroleum Corporation Ltd (BPCL): Key players driving India's self-sufficiency in petrochemicals.

Mitsubishi Chemical & Toagosei (Japan): Specialized producers focusing on high-performance grades.

Tasnee (Saudi Arabia): A major Middle Eastern exporter.

Chinese Producers: This tier includes Handsome Chemical Group, Jiangsu Sanmu Group, CNOOC Huizhou Petrochemical, Shandong Hongxin Chemical, and Shandong Kaitai Petrochemical. These companies contribute significantly to the liquidity of the Chinese domestic market.

Emerging/Other Players:

Fujian Binhai Chemical, Tianjin Bohai Chemical, Wanzhou Petrochemical, Zibo Qixiang Tengda: These players represent the continuous wave of capacity additions within China, often integrated with upstream propylene or downstream adhesive manufacturing.

Value Chain Analysis

The n-Butyl Acrylate value chain is complex and heavily influenced by upstream feedstock markets.

Upstream (Raw Materials):

Propylene: The primary precursor for Acrylic Acid. Propylene prices are volatile and linked to crude oil and propane markets.

n-Butanol: The other half of the equation. n-Butanol is produced via the oxo-process (hydroformylation of propylene). Therefore, BA production is doubly exposed to propylene market dynamics. Shortages or price hikes in n-Butanol often create bottlenecks for BA production even if Acrylic Acid is abundant.

Midstream (Synthesis):

Producers with 'back-integration' (producing their own Propylene, AA, and Butanol) have a massive margin advantage. Non-integrated producers (who buy AA or Butanol on the merchant market) are often squeezed when spreads tighten.

Downstream (Consumption):

The market is closely tied to the construction and automotive sectors. A slowdown in real estate (impacting architectural paints) or auto manufacturing (impacting ACM and coatings) directly reduces demand for BA.

Market Opportunities and Challenges

Opportunities:

Green Coatings Revolution: The ongoing global shift away from Volatile Organic Compounds (VOCs) is boosting water-based acrylic emulsions. Since BA is a key component of these water-based systems, environmental regulations act as a tailwind.

Infrastructure in Emerging Markets: Urbanization in India, Southeast Asia, and Africa requires vast amounts of paint, adhesives, and sealants, ensuring a long-term demand floor for BA.

Innovation in Feedstocks: Projects like Ningbo Changhong's investment in propane-to-acrylic acid technology suggest a future where production costs could decrease, opening new margin opportunities for early adopters of this technology.

Challenges:

Massive Overcapacity in China: The aggressive expansion by Chinese producers (Satellite, Huayi, Wanhua, and new entrants) has created a global supply glut. This puts a ceiling on prices and pressures margins for producers globally, leading to rationalization in higher-cost regions (e.g., Japan).

Raw Material Synchronization: Balancing the supply of Acrylic Acid and n-Butanol is difficult. A disruption in one (e.g., a force majeure at a major Butanol plant) can paralyze BA production, leading to price spikes.

Economic Sensitivity: As a commodity intermediate, BA demand is highly elastic to global GDP. Economic downturns, inflation, and reduced consumer spending on housing renovations or new cars have immediate negative impacts on sales volumes.

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