

# N-tert-butyl-bis-(2-benzothiazolesulfen)amide (TBSI) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### N-tert-butyl-bis-(2-benzothiazolesulfen)amide (TBSI) Market Summary

The global market for N-tert-butyl-bis-(2-benzothiazolesulfen)amide (TBSI) is characterized by steady growth and increasing importance within the specialty rubber chemicals segment. TBSI is a high-performance primary amine-based accelerator, mainly used in tire and rubber product manufacturing. Unlike traditional secondary amine sulfenamides, TBSI does not generate nitrosamine by-products during vulcanization, aligning well with global regulatory and environmental requirements. Its advantages include excellent scorch safety, slower curing speed, high modulus, long curing flatness, improved dynamic performance, and low heat build-up in vulcanized rubber. These features make it especially suitable as a replacement for conventional accelerators such as NOBS and DIBS in demanding tire and industrial rubber applications. The market for TBSI is relatively niche compared with mainstream rubber accelerators but is gaining momentum as tire manufacturers and rubber product producers prioritize sustainability, durability, and safety. The global market is projected to reach between USD 20 million and USD 40 million in 2025, with compound annual growth in the range of 2.5% to 3.5% through 2030.

TBSI has emerged as an effective post-effect slow accelerator that provides an extended vulcanization plateau. This makes it particularly advantageous for large-size tires, off-the-road (OTR) tires, truck and bus radial (TBR) tread compounds, and steel cord adhesive formulations. Its stable performance helps tire producers maintain consistent product quality even under high-temperature processing conditions.

Additionally, the absence of nitrosamine generation addresses growing environmental and health concerns in the rubber chemicals industry. From an industrial perspective, TBSI belongs to the class of specialty rubber chemicals with high technical entry barriers. Production requires advanced synthesis capabilities and strict quality control, limiting the number of global producers. Demand is largely driven by tire production volumes, rubber goods manufacturing, and regulatory trends promoting safer vulcanization chemicals.

## Market Size and Growth Dynamics

The TBSI market is projected to achieve USD 20 million to USD 40 million by 2025, reflecting its specialized positioning in the global rubber accelerator industry. From 2025 to 2030, growth is expected to occur at a CAGR of 2.5%–3.5%. This moderate but steady expansion reflects both the maturity of the tire industry and the rising substitution of older accelerators by TBSI in high-performance applications.

Key growth drivers include:

**Environmental compliance:** Growing restrictions on nitrosamine-generating accelerators are accelerating the adoption of safer alternatives such as TBSI.

**Performance requirements:** Modern tires require higher durability, lower rolling resistance, and improved heat resistance, all of which TBSI supports.

**Global tire industry expansion:** Demand for passenger vehicles, commercial trucks, and off-road equipment sustains long-term consumption of specialty accelerators.

**Shift toward premium and large-size tires:** As consumer and industrial demand for OTR and TBR tires increases, the advantages of TBSI in such applications become more critical.

## Regional Market Outlook

### North America

The North American TBSI market is expected to expand at a CAGR of 2.0%–3.0%. Tire

production in the U.S. and Mexico underpins demand, particularly for large-size truck tires and specialty industrial tires. Regulatory emphasis on nitrosamine-free accelerators has further promoted the shift toward TBSI. The U.S. tire replacement market also adds stability to consumption patterns.

## Europe

Europe is projected to grow at 2.0%–3.0% CAGR. Demand is driven by strict EU regulations limiting hazardous accelerators and the strong focus on sustainability in the automotive supply chain. Germany, France, and Italy lead in tire and rubber product production. European tire manufacturers are among the first to adopt TBSI for environmental compliance and performance optimization.

## Asia-Pacific

Asia-Pacific dominates the global TBSI market with the fastest growth trajectory of 3.0%–4.0% CAGR. China, India, and Southeast Asian countries are major demand centers due to their robust tire production bases. China, in particular, is home to large-scale tire manufacturing for both domestic consumption and export, creating significant demand for advanced accelerators. Japan and South Korea also adopt TBSI in premium tire and specialty rubber goods manufacturing, leveraging the compound's technical performance advantages.

## Latin America

Latin America is forecast to grow at 2.0%–2.5% CAGR. Brazil and Mexico are the primary markets, where tire manufacturers are gradually shifting toward advanced accelerators. While adoption remains limited compared to Asia, regulatory harmonization and increased investments in local tire plants may support future growth.

## Middle East and Africa (MEA)

MEA is projected to grow at 2.0%–2.5% CAGR, with demand linked to tire replacement markets and limited local production. The Gulf countries import and distribute tires extensively, supporting indirect consumption of TBSI in imported goods. Local rubber

product manufacturers in South Africa also contribute to demand, though on a smaller scale.

## Application Outlook

### Tire Industry

The tire industry accounts for the largest share of TBSI consumption and is projected to grow at 2.5%–3.5% CAGR. TBSI is particularly favored for OTR tires, large TBR tires, and high-performance passenger car tires where long curing flatness and low heat build-up are critical. Global tire manufacturers' drive toward sustainability and performance optimization underpins continued adoption.

### Rubber Products

Non-tire rubber products, including conveyor belts, hoses, seals, and industrial rubber goods, represent a secondary market for TBSI. This segment is expected to expand at 2.0%–3.0% CAGR. TBSI provides consistent vulcanization behavior and enhances durability in rubber goods subjected to high stress and thermal loads, making it suitable for industrial applications.

## Key Market Players

### Yasho Industries Limited

Yasho Industries Limited is an Indian specialty chemical producer with a strong presence in rubber accelerators. With an annual production capacity of 5,004 tons of TBSI, Yasho is one of the leading suppliers globally. The company benefits from India's cost-efficient manufacturing environment and growing integration into global tire supply chains.

### Sennics Co. Ltd.

Sennics, a subsidiary of Sinochem International, is a major Chinese producer of rubber chemicals. With a broad product portfolio covering accelerators, antioxidants, and

vulcanizing agents, Sennics integrates TBSI into its specialty accelerator offerings. Its scale and strong customer relationships with Chinese and international tire manufacturers ensure consistent demand.

Shandong Yanggu Huatai Chemical Co. Ltd.

Shandong Yanggu Huatai is another important Chinese player specializing in rubber chemicals. Its production capabilities and competitive cost structure enable it to serve both domestic and export markets. The company has positioned TBSI as part of its strategy to supply eco-friendly and high-performance accelerators to global tire producers.

### Industry Value Chain

The TBSI industry value chain can be divided into three stages:

**Upstream:** The production of benzothiazole derivatives and tert-butyl intermediates forms the raw material foundation for TBSI synthesis. Secure raw material supply and cost stability are critical for competitiveness.

**Midstream:** TBSI producers, including Yasho Industries, Sennics, and Shandong Yanggu Huatai, carry out specialized synthesis processes requiring advanced technology and stringent quality standards.

**Downstream:** Tire manufacturers and rubber goods producers incorporate TBSI into vulcanization systems. End-users benefit from its superior scorch safety, longer curing flatness, and dynamic performance. Value creation is concentrated in downstream applications, where TBSI enables high-performance and environmentally compliant rubber products.

### Opportunities

**Regulatory Compliance:** As regulators tighten controls on nitrosamine-generating accelerators, TBSI adoption is expected to rise globally.

**Shift to Premium Tires:** The expansion of OTR and large-size TBR tires presents strong growth opportunities.

**Sustainability Trends:** Growing demand for eco-friendly rubber accelerators positions TBSI as a preferred solution for manufacturers seeking compliance and performance.

**Emerging Market Adoption:** Increased tire production in India, Southeast Asia, and Africa offers long-term potential for TBSI growth.

## Challenges

**High Production Costs:** Compared with conventional accelerators, TBSI production is more complex and expensive, limiting mass adoption.

**Market Concentration:** Production is concentrated among a small number of suppliers, creating risks of supply disruption.

**Moderate Growth Outlook:** With global tire demand growing slowly and overall rubber accelerator markets maturing, TBSI's expansion is steady but not rapid.

**Customer Price Sensitivity:** Tire manufacturers often operate under tight cost constraints, which can challenge the adoption of higher-priced accelerators such as TBSI.

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