

Butadiene Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Butadiene Rubber, Styrene Butadiene Rubber, Acrylonitrile Butadiene Rubber, Nitrile Butadiene Rubber, Styrene Butadiene Latex, Hexamethylenediamine), By End User (Automobile Industries, Chemical, Plastics and Polymers, Building & Construction, Consumer Products Industries, Healthcare, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Butadiene Market is projected to expand from USD 14.07 Billion in 2025 to USD 18.81 Billion by 2031, registering a CAGR of 4.96%. As a colorless industrial gas primarily generated as a byproduct of ethylene steam cracking, butadiene functions as a vital monomer in the production of synthetic rubbers and thermoplastics. The market is largely sustained by the automotive sector's enduring need for high-performance tires utilizing styrene-butadiene rubber, alongside the construction industry's demand for durable polymers such as acrylonitrile butadiene styrene. These core applications guarantee consistent global consumption patterns and support the long-term commercial sustainability of production facilities, even amidst economic variability in other manufacturing sectors.

Conversely, a substantial hurdle impeding market growth is the inconsistency in feedstock availability stemming from the petrochemical industry's transition toward lighter feedstocks that yield lower volumes of butadiene. This strain on the derivative

market was highlighted by the International Rubber Study Group, which reported a 3.7% decline in global synthetic rubber production during the second quarter of 2025 compared to the previous year. Such a contraction underscores the vulnerability of the global butadiene supply chain to downstream industrial shifts and wider economic challenges.

Market Driver

The growth of the automotive and tire manufacturing industries currently serves as the leading driver for the global butadiene market, fueled by the widespread use of styrene-butadiene rubber (SBR) and polybutadiene rubber (PBR) in tire fabrication. With the recovery of automotive production and the expansion of the global vehicle fleet, the demand for high-performance and replacement tires has intensified, directly bolstering the consumption of butadiene-derived synthetic rubbers. This momentum is particularly visible in major markets where logistics and personal mobility needs are generating significant volume increases. For example, the U.S. Tire Manufacturers Association projected in December 2024 that total U.S. tire shipments would reach 338.9 million units for the year, demonstrating a robust appetite for tire products that supports upstream butadiene orders.

In parallel, rising consumption of acrylonitrile butadiene styrene (ABS) within the consumer goods sector is notably expanding market potential, given ABS's role as a critical material for manufacturing durable housings in electronics and household appliances. This segment is bolstered by urbanization and increasing middle-class spending on modern amenities, maintaining a steady requirement for butadiene feedstock. The strength of this downstream activity is illustrated by data from the National Bureau of Statistics of China in February 2025, which indicated a 12.3% rise in retail sales of household appliances and audio-video equipment in 2024. These advancements are taking place within a wider chemical industry recovery; for instance, BASF reported in October 2024 that sales in its Chemicals segment rose by 11.7% to \$2.7 billion in the third quarter, largely due to volume growth in the petrochemicals division.

Market Challenge

A major obstacle to the expansion of the global butadiene market is the volatility in feedstock availability resulting from the petrochemical sector's strategic shift toward lighter raw materials. Operators of steam crackers are increasingly selecting ethane over heavier options like naphtha to improve cost efficiency, a change that significantly

impacts production outputs. While naphtha cracking produces a large volume of butadiene as a byproduct, ethane cracking yields negligible amounts. As a result, the butadiene supply has become inadvertently restricted and disconnected from actual demand, creating a structural shortage that leaves downstream manufacturers exposed to scarcity and price instability.

The lack of this essential raw material directly inhibits the growth potential of derivative industries, including synthetic rubber and thermoplastic manufacturing. Without a guaranteed stream of monomer, producers are compelled to scale back operations and postpone expansion initiatives, which halts broader market momentum. Data from the American Chemistry Council indicates that global chemical production growth decelerated to 1.9% in 2025, down from a 4.0% increase the prior year. This slowdown demonstrates how supply chain constraints and feedstock limitations ripple through the industrial ecosystem, effectively limiting the commercial scalability of the global butadiene sector.

Market Trends

The accelerating adoption of bio-based butadiene production is transforming the market as stakeholders prioritize carbon neutrality and supply security independent of steam cracker fluctuations. Leading industry players are validating technologies capable of converting renewable feedstocks, such as bio-ethanol, into polymer-grade monomers, thus diminishing dependence on fossil-derived naphtha. This shift is advancing from pilot stages to industrial demonstration, with the goal of establishing sustainable supply chains for synthetic rubber. For example, Hydrocarbon Processing reported in December 2025 that the BioButterfly consortium, comprising partners such as Michelin and Axens, successfully generated bio-butadiene for rubber synthesis via their industrial demonstrator, aiming for full technology approval by mid-2026 to facilitate commercial deployment.

Concurrently, the growing demand for solution styrene-butadiene rubber (S-SBR) in eco-friendly tires is fundamentally changing product offerings as manufacturers look for materials providing better wet grip and rolling resistance. This trend is largely influenced by the electric vehicle sector, which requires high-performance tires capable of handling heavier vehicle loads while optimizing driving range, prompting a structural shift from commodity Emulsion-SBR to specialized S-SBR variants. To capitalize on this high-value segment, producers are actively upgrading facilities to increase output of functionalized rubber. As reported by Rubber Journal Asia in June 2025, Zeon Corporation revealed plans to expand its Singapore operations, projecting that its total

global S-SBR production capacity will hit 125,000 tonnes by 2026 to cater to fuel-efficient tire manufacturing.

Key Market Players

China Petroleum & Chemical Corporation

Royal Dutch Shell Plc

Borealis AG.

Versalis S.p.A.

Eni S.p.A.

Evonik Industries AG

Ineos Group AG

LANXESS AG

LyondellBasell Industries Holdings B.V.

LG Chem Ltd.

Report Scope

In this report, the Global Butadiene Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Butadiene Market, By Product Type

Butadiene Rubber

Styrene Butadiene Rubber

Acrylonitrile Butadiene Rubber

Nitrile Butadiene Rubber

Styrene Butadiene Latex

Hexamethylenediamine

Butadiene Market, By End User

Automobile Industries

Chemical

Plastics and Polymers

Building & Construction

Consumer Products Industries

Healthcare

Others

Butadiene Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Butadiene Market.

Available Customizations:

Global Butadiene Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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