Butadiene has been indispensable for a range of important industrial and consumer products for decades. Even though maybe invisible to the eye of the consumer, this preliminary product of the petrochemical industry can be found in computers, carpets, and various rubbers. Its use in tires makes it a basic product for the growing transportation industry. In 2012, however, indications multiplied that demand for butadiene declines due to slow economic development in downstream industries, the production of tires in particular. This was reflected in the price for butadiene, which fell considerably in all regions since the end of 2012. According to analysts at Ceresana, this slowdown will only be temporary; the market for butadiene is expected to grow again in the future. In 2020, approx. 13.7 million tonnes of butadiene will be processed by downstream industries.

**Strategic Focus Tires**

More than half of total demand for butadiene is generated by producers of styrene-butadiene rubber (SBR) and polybutadiene (BR). Almost 70% of these products are processed by the tire industry. Another important application is the engineering plastic acrylonitrile butadiene styrene (ABS), which is used in, e.g., vehicle parts and casings for office equipment such as computers. Latex based on butadiene is utilized for carpets and paper coatings.

**Dynamic but Heterogenous Development in Asia-Pacific**

Asia-Pacific has for some time now been the major consumer of butadiene, increasing its share of the global market to more than 50%. This region is expected to continue to grow, development in individual countries, however, will be heterogenous: China is projected to experience dynamic development, even though growth rates will not be as high as they had been in the past. The highest growth rate of more than 16% p.a. Ceresana forecasts for India, due to the rapidly growing processing industry in this country. Already saturated markets such as South Korea and Japan, on the other hand, are anticipated to generate only moderate growth rates.

**Factor Innovation**

Until now, butadiene was mainly obtained as by-product of ethylene production. Depending on the raw material used, the quantity of butadiene produced in steam crackers varies. In comparison to the crude oil-based naphtha, ethane based on natural gas contains little C4, causing butadiene yields in ethane production to be low.

This is reflected in the USA, where innovative fracking technology has led to shale gas being increasingly used as feedstock. As a result, production volume of butadiene fell. Thus, relative availability of feedstocks influences production potential of butadiene. The market research institute Ceresana, however, expects low butadiene yields of shale gas to be overcompensated by an innovative method based on butane dehydrogenation.
1 Market Data
1.1 World
1.1.1 Demand
1.1.2 Production and Capacities
1.2 Western Europe
1.3 Eastern Europe
1.4 North America
1.5 South America
1.6 Asia Pacific
1.7 Middle East / Africa

2 Country Profiles
2.1 Western Europe
  2.1.1 France
  2.1.1.1 Demand
  2.1.1.2 Production
  2.1.1.3 Import and Export
  2.1.2 Germany
  2.1.3 Italy
  2.1.4 Spain
  2.1.5 United Kingdom
  2.1.6 Rest of Western Europe

2.2 Eastern Europe
  2.2.1 Poland
  2.2.2 Russia
  2.2.3 Rest of Eastern Europe

2.3 North America
  2.3.1 Canada and Mexico
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2.4 South America
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2.5 Asia Pacific
  2.5.1 China
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  2.5.4 South Korea
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  2.5.6 Thailand
  2.5.7 Rest of Asia-Pacific

Chapter 1: Extensive market data from 2004 to 2020 for the world and each region:
- Production
- Capacities

1.1 World
1.1.3 Production and Capacities
For the 2012 to 2020, we forecast the highest absolute increase for Asia-Pacific.
Production volume in Asia-Pacific is projected to increase at an above-average rate
of X% p.a. to approx. X million tonnes, so that this region will expand its position as
market leader (Graph). The highest relative increase we expect for the Middle East
and Africa that is likely to increase output by X% per year; however, this is mainly
due to the low initial value. Output is likely to rise from X to X tonnes in 2020.
The lead North America and Western Europe hold over the other regions that
develop more dynamically is large enough to continue to rank second and third
despite lower growth rates. In total, we expect global production volume of butadiene
to increase by an average X% p.a. during the next eight years; production volume will
amount to approx. X million tonnes in 2020.

Graph: Worldwide butadiene production from 2004 to 2020 – split by region

1.3 Eastern Europe
1.3.1 Demand
Demand for butadiene in Eastern Europe amounted to X tonnes in 2004 (Graph).
Market volume rose to X tonnes in 2012. We expect total demand for butadiene in
Eastern Europe to continue to rise until 2020. Consumption volume is likely to
increase at rates of X% p.a. to a market volume of approx. X tonnes in 2020. The
Eastern European share of global butadiene consumption will remain almost stable
due to these average growth rates; in 2020, world market share will be roughly X%.

Graph: Butadiene demand in Eastern Europe from 2004 to 2020

Table: Butadiene demand in Eastern Europe from 2004 to 2020 – split by major countries
3 Applications

3.1 World

3.1.1 Styrene-butadiene rubber (SBR)

3.1.2 Polybutadiene rubber (BR)

3.1.3 Latex

3.1.4 Acrylonitrile butadiene styrene (ABS)

3.1.5 Adiponitrile (ADN)

3.1.6 Nitrile rubber (NBR)

3.1.7 Polychloroprene (CR)

3.1.8 Others

3.2 Western Europe

3.3 Eastern Europe

3.4 North America

3.5 South America

3.6 Asia Pacific

3.7 Middle East / Africa

2.5.2 India

2.5.1.1 Demand and Revenues

In 2012, India processed X tonnes of butadiene (Graph). Compared to 2004, this translates into an annual growth rate of X%. We forecast butadiene demand in India to rise to approx. X tonnes in 2020. According to our forecasts, India will be one of the largest growth markets, given a projected AAGR of X%.

Graph: Butadiene demand in India from 2004 to 2020

3.1.2 Polybutadiene (BR)

Worldwide, about X million tonnes of BR were processed (Graph). Polybutadiene rubber (BR) is formed by the polymerization of butadiene. Products made from BR offer very high resilience, good insulation properties, abrasion resistance, and remain flexible at low temperatures. In order to improve the characteristics of final products even further, BR is often mixed with natural rubber or SBR. As is the case with SBR, the majority of BR is used in the tire industry, in the production of the walls of tires in particular. In addition to its use in industrial and conveyor belts, BR is also utilized to impact resistance. We forecast total global sector to rise at average rates of, X% p.a. 2020.

Graph: Worldwide butadiene demand in BR from 2004 to 2020

Chapter 2: Specific analyses and forecasts for 16 countries:
- Total demand
- Demand split by applications
- Revenues
- Production and Trade
- Capacities – split by producers

Chapter 3: Detailed data and influential factors for the use of butadiene in:
- Styrene-butadiene rubber
- Polybutadiene rubber
- Latex
- Acrylonitrile butadiene styrene
- Adiponitrile
- Nitrile rubber
- Polychloroprene rubber
- Others
Chapter 4: Data and facts on major producers, clearly arranged by:

- Contact Details
- Turnover and Profit
- Product Range
- Production Sites, including current and future capacities
- Profile Summary

Note: The profiles are assigned to the country in which the company or holding is headquartered. Company profiles also include JVs and subsidiaries.
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- Adhesives - Europe
- Adhesives - World
- Antioxidants - World
- Automotive Coatings - World
- Automotive Plastics - World
- Bags & Sacks - Europe
- Bags & Sacks - World
- Biocides - World
- Bioplastics - World
- Bitumen - Europe
- Butadiene - World
- Butadiene Rubber (BR) - World
- Caps & Closures - Europe
- Carbon Black - World
- Catalysts - World
- Chelating Agents - World
- Composites (CFRP & GFRP) - World
- Construction Plastics - World
- Corrugated/Solid Board/Carton - Europe
- Engineering Plastics - World
- Ethylene - World
- Expandable Polystyrene - World
- Fillers - Europe
- Fillers - World
- Flame Retardants - World
- Flexible Packaging - Europe
- Food Packaging - Europe
- Hydrofluoric Acid & Fluorochem. - World
- Insulation Material - Europe
- Insulation Material - World
- Labels - Europe
- Masterbatches - World
- Paints & Varnishes - World
- Pigments - World
- Pipes - Europe
- Plastic Additives - World
- Plastic Bottles - Europe
- Plastic Caps & Closures - Europe
- Plastic Caps & Closures - World
- Plastic Containers - Europe
- Plastic Extrusion - World
- Plastic Films - Europe
- Plastic Films - World
- Plastic Injection - World
- Plastic Pipes - Europe
- Plastic Pipes - World
- Plastic Windows - World
- Plasticizers - World
- Plastics - Europe
- Plastics - World
- Polyamide (PA6 & PA66) - World
- Polyethylene (HDPE) - World
- Polyethylene (LDPE) - World
- Polyethylene (LLDPE) - World
- Polyethylene (PE) Pipes - World
- Polypropylene - World
- Polystyrene - World
- Polystyrene & Expandable PS - World
- Polyurethanes & Isocyanates - World
- Polyvinyl Chloride (PVC) - World
- Printing Inks - Europe
- Printing Inks - World
- Propylene - World
- PUR - Adhesives & Sealants - World
- PUR - Paints & Coatings - World
- PVC Pipes - World
- Rigid Metal Packaging - Europe
- Rigid Plastic Packaging - World
- Silicones - World
- Solvents - World
- Stabilizers - World
- Styrene - World
- Styrene-Butadiene Rubber (SBR) - World
- Surfactants - World
- Synthetic Rubber - World
- Thermoplastic Elastomers - World
- Titanium Dioxide - World
- Windows & Doors - Europe