Styrene Butadiene Rubber Market Assessment, By Type [Emulsion SBR, Solution SBR], By Application [Tyres, Adhesives, Footwear, Industrial Goods, Others] By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global styrene butadiene rubber (SBR) market is projected to witness a CAGR of 4.30% during the forecast period 2025-2032, growing from USD 10.77 billion in 2024 to USD 15.09 billion in 2032. The automotive, and adhesives and sealants industries are key influencers for the global styrene butadiene rubber (SBR) market. In the automotive industry, SBR is primarily utilized in tyre manufacturing because of their excellent abrasion resistance, durability, and flexibility. As global vehicle production continues to rise, particularly in emerging markets such as China, India, Japan, South Korea, and Germany, the demand for high-performance tyres made from styrene and butadiene rubber is expected to increase significantly.

The trend is further accelerated due to the increasing production of electric vehicles, which requires specialized tyre formulations to enhance performance and effectiveness.

The use of SBR is very significant in the adhesives and sealants industry, in which pressure-sensitive adhesives (PSAs) are widely used as backing films for tapes, labels, and other application engineering, including flooring. The availability of SBR-based adhesives with strong adhesion and resistance to environmental pressures broadens its suitability over many construction materials. This increase in demand for eco-friendly and green products has greatly boosted the demand for SBR in the automotive tyre industry. The low-carbon footprint materials are a priority for the industry and other users of the product in their manufacturing processes. This is partly due to more stringent emissions controls, but also much more through efforts to reduce the carbon intensity of their applications.

In March 2021, Trinseo PLC and BASF SE collaborated to produce styrene using circular feedstock, aiming to improve their environmentally friendly styrene development and management. Trinseo has begun using BASF's circular feedstock styrene in its solution-styrene butadiene rubber (S-SBR) and polystyrene (PS) products. The S-SBR is supplied to major tyre manufacturers, while the PS products are used in food packaging and appliances.

Increasing Demand from the Adhesives and Sealants Industry Boosts Market Growth

The inherent properties of styrene butadiene rubber (SBR), such as flexibility and water resistance, along with high adhesive qualities, make them suitable components for different kinds of adhesive and sealant formulations. These products are essential for applications in various sectors, including construction, automobiles, packaging, and industries. Increased construction and renovation work, especially in emerging countries, has increased the demand significantly for SBR-based adhesives and sealants on a global scale.

This, in turn, is forcing manufacturers of the automotive industry to add to the rising demand for SBR in adhesives and sealants driven by the demand for lightweight and durability that promotes fuel efficiency and safety for users. Manufacturers are also driven by the demand for ecologically friendly products by introducing SBR formulations with very low VOCs and other eco-friendly characteristics. The increased interest in sustainability in commercial and residential construction continues to fuel the use of SBR-based sealants with extended service lifetimes and lower environmental impact.

In April 2022, DYNASOL Group added a new line of Styrene-Butadiene rubber in Santander, Spain to further increase its production capacity. This will increase flexibility further in the production of more SBS or SSBR as needed. SSBRs are used for high-end applications such as plastic modification, adhesives, asphalt modification, and industrial products. This will represent a 20 KTA production increase in Spain, which can be scaled up to 25 KTA and was on stream in 2024.

Sustainability Emphasis on Tire Manufacturing Fuels the Demand for Styrene Butadiene Rubber

With regard to sustainability, premium tire manufacturing is trending upward, and demand for styrene butadiene rubber is prominently increasing. Since environmental concerns are on the rise, tire manufacturers are moving towards more eco-friendly materials with reduced carbon footprints and high sustainability factors. Consequently, bio-based and recycled materials are making their presence felt in SBR formulations and directly contributing to higher standards in terms of global sustainability goals. Manufacturers are responding to regulatory pressure by developing environmentally friendly SBR versions that meet very stringent environmental requirements. Low rolling resistance tires improve fuel efficiency and reduce emissions, further driving demand for SBR. Improvements in production technologies, such as solution SBR, improve performance properties and thus also support initiatives toward sustainability. The two major groups of SBR include Emulsion SBR (ESBR) and Solution SBR (SSBR). These two are used for different purposes in different industries. ESBR is heavily used to produce tyre tread and sidewalls because it possesses the properties that provide the right balance of performance and cost, while SSBR is highly used to manufacture high-performance tyres on account of its improved wet traction and rolling resistance.

In April 2023, Bridgestone Americas Bridgestone Americas announced a run of demonstration tyres made with 75% recycled and renewable materials, aligning with its goal of using 100% sustainable materials by 2050. The tyres feature 38% renewable, 37% recycled content, natural rubber with hevea and guayule, sustainable materials with a low environmental and social impact, tyre pyrolysis oil, and ISCC-certified bio, bio-circular, and circular butadiene rubber, and styrene butadiene rubber.

Tyre Manufacturing; One of the Largest Applications of Styrene Butadiene Rubber

Styrene Butadiene Rubber (SBR) is the perfect material for tyres as it combines abrasion resistance, elasticity, and strength. The diverse conditions tyres encounter in terms of road surfaces, temperatures, and speeds necessitate this combination of properties. As a result, the growth in the automobile industry, driven by both replacement demand and increased vehicle production, has significantly fueled the SBR market. The tyre industry relies on different grades of SBR to optimize the performance of the tyres. For example, emulsion SBR is the most common for standard tyres due to its good abrasion resistance and durability. Solution SBR is preferred for high-performance tyres due to superior wet traction and rolling resistance, which enhances fuel efficiency without compromising safety or grip.

Sustainability and regulatory emphasis have led to innovations in tyre manufacturing that include bio-based and recycled SBR, all in accordance with global environmental initiatives. The introduction of electric vehicles into the market presents a new dimension to tyre manufacture, calling for specialized tyres with low rolling resistance and maximum energy efficiency, further driving evolution in SBR formulations.

Styrene Butadiene Rubber (SBR) offers an ideal balance of abrasion resistance, elasticity, and strength, making it a key material in tyre manufacturing. The diverse conditions tyres encounter varying road surfaces, temperatures, and speeds necessitate this combination of properties. Consequently, the growth in the automobile industry, driven by both replacement demand and increased vehicle production, has significantly fueled the SBR market. The tyre industry relies on different grades of SBR to optimize tyre performance. For instance, emulsion SBR is commonly used in standard tyres due to its excellent abrasion

resistance and durability. Solution SBR, on the other hand, is preferred for high-performance tyres because of its superior wet traction and rolling resistance, which enhances fuel efficiency without compromising safety or grip.

Continued sustainability and regulatory focus have led to innovations that include bio-based and recycled SBR in the production of tyres, all in line with global environmental initiatives. The addition of electric vehicles into the market introduces a new dimension to tyre manufacture, which requires specialized tyres with low rolling resistance and maximum energy efficiency, which further drives evolution in SBR formulations.

In December 2023, the European synthetic rubber firm Synthos S.A. and South Korea's second-largest tire manufacturer, Kumho Tire Co., teamed together to conduct collaborative research and development on sustainable tyre materials. The MOU calls for the two businesses to increase the use of eco-friendly synthetic rubber in tyre production and carry out a cooperative research and development project for Neodymium-Butadiene rubber using Bio-Butadiene.

Asia-Pacific Dominates the Global Styrene Butadiene Rubber Market

Asia-Pacific leads the global styrene butadiene rubber (SBR) market and holds a significant share in global consumption and production. The dominance is primarily due to high-speed industrialization and urbanization, besides strong demand from diverse end-use segments such as automobiles, footwear, adhesives and sealants etc. Additionally, the region offers a solid basis for manufacturing SBR with the bulk of its supplies coming from countries such as China, Japan, and South Korea. China has surpassed other countries and emerged as the world leader in producing synthetic rubber, including styrene butadiene rubber, considering that the country has mass-scale manufacturing and availability of raw materials in great abundance. The region is also bestowed with many chemical and rubber manufacturers that allow smooth processes because of economies of scale that make their products much cheaper by production cost and increased competition.

The robust automotive industry is a key driver of SBR demand within the Asia-Pacific region, where vehicle production and sales are increasing due to rapid investment from emerging-market nations and Southeast Asian sources. SBR is widely preferred for tyre manufacturing because of its excellent properties, including abrasion resistance, flexibility, and durability. The adoption of high-performance tyres produced with SBR is gaining momentum as consumers shift towards personal vehicles and governments promote investments in developing supporting infrastructure along with production bases in the countries.

In April 2023, Hainan Baling Chemical New Material Co., Ltd., a subsidiary of China Petroleum & Chemical Corporation, started production of its styrene-butadiene copolymer (SBC) in Hainan, China With the investment of USD 279.74 million, the company set up the plant with an annual production capacity of 170,000 tons. At the SBC facility of the project, 170,000 tons of SBS and SEBS products are manufactured every year, including 120,000 tons of SBS products and 50,000 tons of SEBS products.

Future Market Scenario (2025 – 2032F)

- The styrene butadiene rubber market is anticipated to witness significant growth in the coming year led by increased sustainable and environmentally friendly production technologies, including using recycled and bio-based products.
- As the automotive industry continues its emphasis on fuel efficiency and electrical vehicle applications, the development of styrene butadiene rubber formulations that advance performance and sustainability will be of greater importance in the future.
- Demand for hybrid rubber goods, which combine natural and synthetic materials, is likely to increase as manufacturers seek solutions that balance cost with performance.
- Advances in polymer processing technologies and the usage of additives with the aim to enhance properties, such as strength and heat resistance, are all expected to give shape to the future of the global styrene butadiene rubber market.

Key Players Landscape and Outlook

The market is highly competitive with the presence of several leading players. The companies involved in the manufacture and supply of SBR, E-SBR as well as S-SBR variants are investing for technological advancement and innovation in the product formulation to improve their performance and cope with the high demand in diversified applications, which is mainly concentrated in the tyre manufacturing industry in the automotive segment.

Markets are witnessing strategic plays involving mergers, acquisitions, and partnerships that expand production capacities and enhance sustainability practices. Investments are also being made in the development of more environmentally friendly alternatives and recycling methods aimed at achieving the goals associated with global sustainability trends. The Asia-Pacific region, however, is still a key area for such companies because of its high consumption and production potential, particularly in such nations as China and South Korea. Overall, the player landscape is dynamic, with established firms and emerging entrants

continuously adapting to market trends and consumer preferences.
In November 2021, Asahi Kasei Corporation and Shell Eastern Petroleum (Pte) Ltd concluded a contract to supply biomass- and plastic-waste-made butadiene. Asahi Kasei plans to begin manufacturing and selling sustainable solution-polymerized styrene-butadiene rubber (S-SBR) utilizing such sustainable butadiene at its factory in Singapore.

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