

Polybutadiene Rubber (PBR) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Polybutadiene Rubber Market size is estimated at USD 8.01 billion in 2025, and is expected to reach USD 9.73 billion by 2030, at a CAGR of 3.95% during the forecast period (2025-2030).

The COVID-19 pandemic had negatively impacted the market for polybutadiene rubber market. The nationwide lockdowns and strict social distancing measures had resulted in a halt in automotive vehicle manufacturing, thereby affecting the market for polybutadiene rubber. However, post-COVID pandemic, the market recovered well after the restrictions were lifted. The market recovered significantly, owing to the rise in demand for polybutadiene rubber in tire manufacturing, footwear, and sports accessories applications.

Key Highlights

- The increasing demand from the automobile industry and the growth in the synthetic rubber industry are expected to drive the polybutadiene rubber market.
- The stringent environmental regulations and the health concerns regarding exposure to polybutadiene are expected to hinder the market's growth.
- The upcoming consumer shift to electric vehicles is expected to create opportunities for the market during the forecast period.
- The Asia-Pacific region is expected to dominate the market. It is also expected to register the highest CAGR during the forecast period due to rising demand for polybutadiene rubber in tire manufacturing, footwear, and sports accessories applications.

Polybutadiene Rubber Market Trends

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Tire Manufacturing Application Segment to Dominate The Market

- Butadiene is used in the manufacturing of synthetic rubbers and elastomers that include polybutadiene rubber (PBR), styrene-butadiene rubber (SBR), nitrile rubber (NR), and polychloroprene (Neoprene), all of which are used in the production of other goods and materials.
- PBR is used in the manufacturing of tires. Polybutadiene is primarily utilized in the production of automotive tires. It is estimated that the tire manufacturing process consumes over 70% of the world's polybutadiene production. It is primarily utilized in tires as a sidewall to reduce fatigue caused by continual flexing throughout the run. Butadiene is also used in a variety of other automotive components.
- In countries like the United States, the shipment of tires is increasing, which is driving the market for Polybutadiene rubber. According to the U.S. Tire Manufacturers Association (USTMA), the total shipments of tires are expected to reach 334.2 million units in 2023, as compared to 332.0 million units in 2022 and 332.7 million units in 2019.
- Furthermore, according to the U.S. Tire Manufacturers Association (USTMA), in 2023, Original Equipment (OE) shipments for passenger, light truck, and truck tires are expected to change by 2.3%, 1.3% and -0.6%, respectively, with a total increase of 1.0 million units. Thus, the increasing demand for automotive OEM industries will drive the current studied market.
- The increasing production volume of automotive vehicles is driving the market for Polybutadiene Rubber used in tire manufacturing. According to OICA, global automotive vehicle production reached 85 million in 2022, as compared to 80.2 million manufactured in 2021, at a growth rate of 6%. China, the United States, and India are the most prominent automotive vehicle markets globally.
- The rising demand for electric vehicles in recent years, as well as an impending consumer shift to electric vehicles, are expected to provide opportunities for polybutadiene rubber (PBR) tires during the forecast period. In Europe, the production volume of electric vehicles is increasing in countries like Germany and the United Kingdom.
- In Germany, automakers are investing heavily in producing electric vehicles in the country. For instance, In June 2023, Ford announced the inauguration of the Cologne Electric Vehicle Center, a hi-tech production facility in Germany that will build Ford's new generation of electric passenger vehicles for millions of European customers. According to Ford, the Cologne Center has an annual production capacity of 250,000 electric vehicles. Thus, the increasing production of electric vehicles is expected to drive the current studied market.
- Thus, the tire manufacturing application segment to dominate the market during the forecast period.

Asia-Pacific Region to Dominate the Market

- The Asia-Pacific region is expected to dominate the market for polybutadiene rubber during the forecast period. In countries like China, India, and Japan, the market is expected to grow exponentially owing to the increasing demand from applications such as tire manufacturing, industrial rubber manufacturing, and footwear.
- China is the world's biggest automobile market in terms of both production and sales. According to the Organisation Internationale des Constructeurs d'Automobiles (OICA), vehicle production in China reached a total of 27.02 million units in 2022, which is an increase of 3% over 2021 for the same period.
- In China, the automotive industry is witnessing switching trends as the consumer inclination toward battery-operated vehicles is higher. As per the China Passenger Car Association, the country sold 5.67 million EVs and plug-ins in 2022, almost double the sales figures achieved in 2021. These trends will increase the demand for automotive tires in the country, thereby driving the current studied market.
- Furthermore, according to the China Rubber Industry Association (CRIA), the country is projected to produce 704 million tires per year by 2025, including 527 million passenger radial tires, 148 million truck/bus radial tires, 29 million bias truck tires, 20,000 extra-large industrial tires, 12 million agricultural tires, and 54,000 aircraft tires. Thus, the demand for polybutadiene rubber is

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expected to grow in the country.

- India is also one of the largest producers and consumers of rubber in the Asia-Pacific region. The Indian rubber industry exhibits the co-existence of the rubber production sector and the fast-growing rubber products manufacturing and consuming sector.
- According to the Automotive Tire Manufacturers' Association (ATMA), the Indian tire industry revenue is expected to reach USD 22 billion by FY 2032, as compared to USD 9 billion registered in FY 2022. Thus, the increase in demand for tires is expected to drive the market for the current studied market.
- In India, about 12% of rubber is used to produce footwear. The penetration of international brands, coupled with urbanization, has driven the footwear market in the country. The government has focused on the footwear industry under the 'Make in India' initiative. The country is currently producing around 9% of the global annual production of footwear. The footwear sector in India is one of the largest in the region, behind China.
- Due to all such factors, the market for polybutadiene rubber in the region is expected to grow during the forecast period.

Polybutadiene Rubber Industry Overview

The polybutadiene rubber market is partially consolidated in nature. Some of the major players in the market include (not in any particular order) ENEOS Materials Corporation, Arlanxeo, Zeop Co., Lanxees, and UBE Co., among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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