

The Bio-butadiene market is projected to reach USD 94 million by 2029, at a CAGR of 10.1% from USD 58 million in 2024. The [Bio-butadiene market growth](#) is driven by the growing consumer demand for environmentally friendly and sustainable products, especially in premium segments such as fashion and automotive. Additionally, the use of bio-based chemicals is on the rise across various industries, including packaging, agriculture, and automotive. This trend is further driven by stringent government regulations and policies aimed at reducing plastic waste and achieving net-zero targets.

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Several key drivers are propelling the growth of the bio-butadiene market. Stringent environmental regulations, shifting consumer trends, and a strong emphasis on sustainable development are major drivers for the bio-butadiene market. Governments worldwide are increasingly implementing rigorous environmental regulations aimed at reducing carbon emissions and minimizing the environmental impact of industrial processes. These regulations compel industries to seek eco-friendly alternatives to traditional petrochemical products, thus boosting the demand for bio-butadiene. Concurrently, consumers are becoming more environmentally conscious, favoring products that are sustainable and have a lower carbon footprint. This shift in consumer preferences is encouraging manufacturers to adopt bio-based materials, including bio-butadiene, to align with market expectations and enhance their brand image. Bio-butadiene, produced from renewable feedstocks, fits perfectly within these sustainability frameworks, making it an attractive option for industries looking to reduce their reliance on fossil fuels and contribute to a circular economy. Together, these factors create a robust market environment for bio-butadiene, driving its growth and adoption across various sectors.

“Styrene butadiene rubber by type is projected to be the fastest growing, in terms of value, during the forecast period.”

Styrene butadiene rubber (SBR) is anticipated to be the fastest-growing type in the bio-butadiene market due to its versatile applications and high demand across multiple industries. SBR is widely used in the production of tires, footwear, adhesives, and various other consumer goods due to its excellent abrasion resistance, durability, and flexibility. As the automotive industry continues to prioritize sustainability and eco-friendly materials, the demand for biobased SBR is expected to surge. Moreover, the construction sector, which relies heavily on SBR for applications such as sealants and coatings, is also driving the growth of biobased SBR. Technological advancements in bio-refining and bioprocessing have enabled the production of high-quality bio-based SBR, making it a viable and competitive alternative to its petrochemical counterpart. Additionally, stringent environmental regulations and consumer preferences for sustainable products further bolster the demand for biobased SBR. As a result, SBR is poised to experience rapid growth in the bio-butadiene market, driven by its widespread applications and the shift towards greener alternatives across various industries.

“Synthetic rubber application is projected to be fastest growing application, in terms of value, during the forecast period.”

Synthetic rubber is expected to be the fastest-growing application in the bio-butadiene market due to its diverse range of uses and the increasing demand for sustainable alternatives. Synthetic rubber is utilized in various industries such as automotive, construction, and consumer goods for its superior properties, including durability, resilience, and chemical resistance. As industries worldwide strive to reduce their environmental footprint and comply with stringent regulations, there is a growing preference for bio-based materials like bio-butadiene. Synthetic rubber derived from bio-butadiene offers similar performance characteristics to its petrochemical counterpart but with the added benefit of being renewable and eco-friendly. The automotive industry, in particular, is driving the demand for bio-based synthetic rubber for tire manufacturing and other automotive components. Technological advancements

in bio-refining processes have made the production of bio-based synthetic rubber more efficient making it an attractive option for manufacturers.

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“Automotive by end-user segment is projected to be largest, in terms of value, during the forecast period.”

The automotive end-use segment is poised to become the largest market in the bio-butadiene market due to several key factors. Firstly, the automotive industry is one of the largest consumers of butadiene-based products, particularly synthetic rubber used in tire manufacturing. With the increasing focus on sustainability and reducing carbon emissions, automotive manufacturers are increasingly adopting bio-based alternatives, such as bio-butadiene, for tire production and other automotive components. Additionally, stringent regulations aimed at reducing the environmental impact of vehicles are driving the demand for eco-friendly materials. Bio-butadiene offers a renewable and sustainable alternative to traditional petrochemical-derived butadiene, making it an attractive option for automotive applications. Moreover, technological advancements in bio-refining processes have enhanced the quality and efficiency of bio-based materials, further boosting their adoption in the automotive sector. As a result, the automotive end-use segment is expected to witness significant growth in the bio-butadiene market, driven by the industry's need for sustainable solutions and the shift towards greener alternatives.

“Laboratory grade is projected to be second largest by grade segment, in terms of value, during the forecast period.”

Laboratory-grade bio-butadiene is anticipated to become the second-largest segment in the bio-butadiene market due to its critical role in research, development, and testing activities across various industries. Laboratory-grade bio-butadiene is essential for conducting experiments, formulating new products, and assessing the performance of materials in controlled laboratory settings. Moreover, research institutions, universities, and government laboratories utilize laboratory-grade bio-butadiene for academic research, scientific studies, and technological advancements. The increasing emphasis on sustainability and eco-friendly materials is also driving the demand for bio-based laboratory reagents, including bio-butadiene, to align with environmental objectives and reduce reliance on fossil fuels. Additionally, the growing investment in research and development activities, coupled with advancements in bio-refining technologies, is expected to further stimulate the demand for laboratory-grade bio-butadiene.

“North America is expected to be the second largest market for bio-butadiene during the forecast period, in terms of value.”

North America is poised to become the second-largest market for bio-butadiene due to several key factors. Firstly, the region has a strong emphasis on sustainability and environmental conservation, leading to increasing demand for bio-based alternatives in various industries. Stringent environmental regulations and initiatives aimed at reducing carbon emissions are driving the adoption of bio-butadiene as a renewable and eco-friendly raw material. Additionally, North America has a well-established automotive industry, which is a major consumer of butadiene-based products, particularly synthetic rubber for tire manufacturing. As automotive manufacturers prioritize sustainability and seek greener materials, the demand for bio-butadiene is expected to rise. Moreover, the region's robust research and development infrastructure, coupled with ongoing advancements in bio-refining technologies, are contributing to the growth of the bio-butadiene market in North America.

Bio-Butadiene Companies

The key players in this market are SABIC (Saudi Arabia), Michelin (France), Zeon Corporation (Japan), Biokemik (Spain), ETB Catalytic Technologies (Netherlands), Trinseo (US), Genomatica (US), Braskem (Brazil), Versalis (Italy), Synthos (Poland), Lummus Technology (US), INVISTA (US), LanzaTech (US), Michelin (France), IFPEN (France), Zeon Corporation (Japan), Global Bioenergies (France), Evonik Industries (Germany), Axens (France). These companies are strong in their home regions and explore geographic diversification alternatives to grow their businesses. They focus on increasing their market shares through new product launches and other expansions.

SABIC

SABIC (Saudi Basic Industries Corporation), founded in 1976, is a global leader in diversified chemicals with its headquarters in Riyadh, Saudi Arabia. SABIC is known for its innovative solutions and commitment to sustainability, operating in over 50 countries with a workforce of over 33,000 individuals. The company is a major player in the production of chemicals, industrial polymers, fertilizers, and metals. One of its notable products is bio based butadiene, a key component in the production of synthetic rubbers and plastics, essential for various industries like automotive, construction, and consumer goods.

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Biokemik

Biokemik was founded in May 2015. Its headquarters are located in Spain. Biokemik is a company that specializes in producing high-value-added chemicals from renewable raw materials. Formed through a collaboration between Tecnalia Research & Innovation and Kereon Partners, Biokemik focuses on creating bio-based chemicals using sustainable processes. Their portfolio includes products like bio-1,3-butadiene, bio-2,3-butanediol, bio-acetoin, and bio-methyl ethyl ketone, which are essential in industries such as rubber manufacturing, plastics, and fine chemicals?.

The company aims to address the global demand for sustainable and environmentally friendly chemical solutions, particularly in the automotive and packaging industries. Their products not only support the transition to greener alternatives but also align with stringent government regulations aimed at reducing plastic waste and achieving net-zero targets.

Michelin

Michelin is a renowned French multinational company best known for its high-quality tires. Michelin was founded in 1889. Its headquarters are located in France. Michelin has a robust global presence, operating in over 170 countries worldwide. The company supports its extensive operations with more than 70 production facilities, research centers, and sales offices around the globe. This global network allows Michelin to provide local support and tailored solutions to customers in diverse markets?. In North America alone, Michelin has a significant footprint, employing around 22,750 people and maintaining 20 manufacturing facilities. Additionally, Michelin has been deeply involved in the economic development of regions such as South Carolina, where it has made substantial investments in expanding its production capabilities.

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Braskem

Braskem S.A. is a major petrochemical company headquartered in São Paulo, Brazil. Founded in 1972, it is the largest producer of thermoplastic resins in the Americas and a leading producer of biopolymers globally. Braskem's product portfolio includes polyethylene (PE), polypropylene (PP), polyvinyl chloride (PVC), and various other chemicals and fuels.

Braskem is the largest producer of thermoplastic resins in the Americas and holds a significant position in the global petrochemical market. The company places a strong emphasis on sustainable development and innovation, investing in renewable chemicals and environmentally friendly production processes. With a global presence, Braskem operates in North America, South America, Europe, and Asia, offering a wide range of chemical products to various industries.

ETB Catalytic technologies

ETB Catalytic Technologies, founded in 2001, is a leader in advanced catalytic processes and solutions for the chemical and energy sectors. Headquartered in United States, the company specializes in developing innovative catalytic technologies that enhance the efficiency, selectivity, and sustainability of chemical processes. ETB operates through several key business segments: refining catalysts, which improve the yield and quality of fuels and petroleum products; petrochemical catalysts, which boost the efficiency and selectivity of olefin production, aromatic processing, and polymerization; environmental catalysts, which help reduce emissions from industrial processes and vehicles, and treat wastewater; and renewable energy catalysts, which facilitate the production of biofuels, green hydrogen, and other renewable energy sources.