1,4 Butanediol (BDO) Market Analysis By Application (Tetrahydrofuran (THF), Polybutylene Terephthalate (PBT), Gamma-Butyrolactone (GBL), Polyurethane (PU)), By Region (North America, Europe, Asia Pacific, CSA, MEA), And Segment Forecasts, 2014 - 2025

Description: The global 1,4 butanediol (BDO) market is projected to reach USD 12.6 billion by 2025. Pioneers of bio-based technologies such as Geomatica and BioAmber have paved the path for sustainable BDO production from renewable feedstock, which has influenced consumption patterns in recent years.

Companies are increasingly adopting good manufacturing practices and integrating advanced production technologies to comply with transitioning regulatory framework and consumer specifications. Producers have shifted their focus towards sustainable production and boosted the reliance on natural & renewable resources to eliminate wastage & pollution.

Tetrahydrofuran (THF) was the dominant application in 2015, occupying over 48% of the revenue share. THF is mostly utilized to derive PTMEG, which is then further processed into spandex fibers for sportswear, medical & automotive interiors. Transitioning consumer lifestyles are encouraging the foray of spandex producers into new markets, thereby leading to higher BDO consumption.

Further key findings from the study suggest:

Polyurethanes are expected to grow at a high CAGR of 8.4% in terms of revenue from 2016 to 2025. Increasing consumption of PU in foams, adhesives, and coatings to be a vital factor

PBT also emerged as an important application owing to the substitution of conventional metals in automotive & electronics sectors, and the introduction of new generation PBT grades

Development of bio-based feedstock has influenced the production of derivatives such as PBT, with a shift towards sustainable plastics formation to meet regulatory criteria

Gamma-butyrolactone (GBL) expected to account for 14% of the overall revenue by 2025, growing at 6.4% CAGR over the forecast period. High demand for manufacturing pyrrolidones from GBL, which are further utilized as industrial chemicals in several applications

Asia Pacific emerged as the dominant segment with over 63% volume share in 2015. Rising consumer disposable income, expanding end-use industries and growing awareness regarding sustainable resources expected to foster industry growth

Manufacturers in developed countries across North America & Europe are shifting production bases to emerging economies to tap lucrative opportunities and cater to the domestic demand

Influential companies in the industry include The Dow Chemical Company, BASF SE, Invista, LyondellBasell Industries, Mitsubishi Chemical Corporation, ExxonMobil Chemicals, International Specialty Products, and BioAmber Inc.

In February 2016, Mitsui invested approximately USD 25 million in BioAmber for the production of bio-succinic acid and BDO at 35,000 and 23,000 tons respectively

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