

Global Poly (Butylene Adipate-Co-Terephthalate) Market Size Study & Forecast, by Application and End Use, and Regional Forecasts 2025–2035

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Abstracts

The Global Poly (Butylene Adipate-Co-Terephthalate) Market is valued at approximately USD 1.73 billion in 2024 and is expected to register a robust compound annual growth rate (CAGR) of 7.89% over the forecast period 2025 to 2035. Poly (Butylene Adipate-Co-Terephthalate), commonly known as PBAT, has swiftly carved a niche for itself as an eco-friendly, biodegradable alternative to traditional petroleum-based plastics. Its unique blend of flexibility, compostability, and thermoplastic characteristics positions it as a preferred material across diverse sectors, particularly in single-use and packaging applications. As environmental regulations tighten and consumer sentiment swings dramatically toward sustainability, PBAT emerges as a linchpin material in the quest to transition from a linear to a circular plastics economy.

Key market drivers shaping this transition include surging demand for biodegradable packaging in foodservice, retail, and agriculture, driven by growing bans on single-use plastics and a push for compostable alternatives. From mulch films improving crop yield while decomposing in soil, to cling films and composite bags catering to compostable packaging mandates, PBAT's use cases are expanding rapidly. Moreover, technological breakthroughs in polymer blends and manufacturing techniques are enhancing its mechanical strength and processability. However, its relatively high production costs, limited commercial-scale feedstock availability, and lack of widespread composting infrastructure in emerging markets are obstacles that continue to restrain its mainstream adoption.

From a regional standpoint, Europe held a significant market share in 2025, largely attributed to its progressive regulatory landscape and aggressive decarbonization goals under the EU Green Deal. Countries like Germany, France, and Italy have heavily

incentivized the production and consumption of bio-based polymers. North America is also advancing steadily, bolstered by innovation in sustainable consumer packaging and active government support for green chemistry. However, the Asia Pacific region is poised to dominate future growth, fueled by rapid industrial expansion, environmental consciousness in nations such as China, Japan, and India, and increasing investment in bioplastics R&D and composting infrastructure.

Major market player included in this report are:

BASF SE

Eastman Chemical Company

Novamont S.p.A.

NatureWorks LLC

Mitsubishi Chemical Group Corporation

SK Global Chemical Co., Ltd.

JinHui ZhaoLong High Technology Co., Ltd.

FKuR Kunststoff GmbH

Anqing Hexing Chemical Co., Ltd.

Kingfa Sci. & Tech. Co., Ltd.

BioSphere Plastic LLC

Biotech Energy Inc.

Zhejiang Hisun Biomaterials Co., Ltd.

Lotte Fine Chemical Co., Ltd.

Tianan Biologic Material Co., Ltd.

Global Poly (Butylene Adipate-Co-Terephthalate) Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025–2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

By Application:

Composite Bags

Bin Bags

Mulch Films

Cling Films

Stabilizers

By End Use:

Packaging

Agriculture & Fishery

Consumer Goods

Coating

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional level analysis for each market segment.

Detailed analysis of geographical landscape with Country level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of competitive structure of the market.

Demand side and supply side analysis of the market.

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