

Global Bio-Based Polypropylene (PP) Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Bio-Based Polypropylene (PP) competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Bio-Based Polypropylene is polypropylene in which part or all of the carbon originates from renewable feedstocks such as bio-ethanol, bio-naphtha, waste cooking oil, or other bio-oils while the polymer backbone remains chemically identical to fossil PP. Biobased content is typically determined via radiocarbon analysis under standards like ISO 16620 and ASTM D6866, and for mass-balance routes, schemes such as ISCC PLUS or similar chain-of-custody systems allocate renewable input across integrated cracker and polymer assets. This allows producers to deliver drop-in PP homopolymers, copolymers, and compounds with certified bio or bio-attributed content that can run on existing converting lines for packaging, automotive interiors, appliances, fibers, and medical articles. Compared with bioplastics that introduce new chemistries, bio-based PP matters because it offers lower embedded greenhouse gas footprint and a renewable carbon story while keeping the same processing window, mechanical performance, and mono-material recyclability platform as standard PP. Upstream, feedstock options span sugarcane or corn-based ethanol dehydrated to bio-propylene, bio-naphtha derived from tall oil, used cooking oil, or waste animal fats that is co-cracked with fossil naphtha, and industrial side streams such as fatty-acid distillates. Integrated petrochemical groups like SABIC, Borealis, LyondellBasell, Mitsui Chemicals and TotalEnergies operate ISCC PLUS certified chains where specified batches of renewable feedstock are mass-balanced into PP grades under brands such as TRUCIRCLE, Pralus or Circulen Renew. Downstream, compounders including BIO-FED, FKUR, NaturePlast, Biobent, Avient, LCY, Yujie and Suedpack formulate bio-based or bio-filled PP compounds with natural fibers, starch, cellulose or coffee-ground

fillers for packaging, consumer goods and automotive interiors, often verified by ISCC or similar schemes. Typical procurement patterns combine long-term framework agreements for certified feedstock-based resins with annual price renegotiations indexed to fossil PP and bio-feedstock premiums, while smaller buyers often source through compounders on project-by-project contracts. Given the higher cost of renewable feedstocks, complexity of certification, and relatively small scale compared with commodity PP, steady-state gross margins for established bio-based PP suppliers tend to cluster around 0.25 of revenue, supported by technical know-how in mass balance accounting, multi-site certification, application development with brand owners, and long qualification cycles in automotive, healthcare and food-contact packaging. In the current market, global production is around 29000 ton, with an average selling price of about 1900 USD per ton EXW basis. Based on sales, the supply side remains relatively concentrated: aggregating certified bio-based and bio-attributed PP volumes suggests an industry CR5 by revenue around 0.65 and a CR10 close to 0.9, with SABIC, Borealis, LyondellBasell, Mitsui Chemicals and TotalEnergies together forming the core supply, and compounders such as BIO-FED, FKUR, NaturePlast and Avient providing much of the visible volume into niche applications. Demand is currently weighted toward Europe, Japan and North America, where brand-owner sustainability targets, recycled-content mandates, and upcoming packaging regulations push converters to lower the fossil share of polyolefin packaging; Asia outside Japan is emerging as the next growth region as local petrochemical groups scale ISCC-certified lines. Looking ahead to 2025-2031, growth is expected to outpace overall PP demand as bio-feedstock availability increases, new projects such as bio-propylene routes and large-scale bio-naphtha co-processing ramp up, and automakers and electronics brands tighten life-cycle carbon thresholds. At the same time, the sector faces constraints from competition for sustainable lipids and waste oils, certification and auditing costs, and capital-intensive cracker and polymer debottlenecks. Digitalization and AI are beginning to appear in process optimization, demand forecasting and footprint calculation tools, allowing suppliers to tune cracker allocations and compound formulations in near real time, but these remain incremental enablers rather than primary demand drivers. Overall, bio-based PP is transitioning from pilot and niche compounds toward a small but strategic fraction of the global PP pool, tightly coupled to policy signals, brand-owner commitments, and the pace at which renewable feedstocks can be mobilized at scale.

The global Bio-Based Polypropylene (PP) market size was estimated at USD 55.1 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 23.20% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Bio-Based

Polypropylene (PP) market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Bio-Based Polypropylene (PP) market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Bio-Based Polypropylene (PP) market.

Global Bio-Based Polypropylene (PP) Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

SABIC
LyondellBasell
Borealis

Mitsui Chemicals

TotalEnergies

Repsol

BIO-FED

FKuR Kunststoff

NaturePlast

Biobent Polymers

Avient

Ducor Petrochemicals

LCY Chemical

Suedpack Compounds

Braskem

Sinopec

Market Segmentation (by Type)

Bio Ethanol Route

Bio Naphtha Mass Balance

Waste Oil and Fat Mass Balance

Bio Filled Composite

Other Renewable Routes

Market Segmentation (by Application)

Packaging

Automotive and Transportation

Consumer Goods and Appliances

Textiles and Nonwovens

Building and Construction

Others

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Bio-Based Polypropylene (PP) Market
Overview of the regional outlook of the Bio-Based Polypropylene (PP) Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Bio-Based Polypropylene (PP) Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Bio-Based Polypropylene (PP), their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well

as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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