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Global Bio-Succinic Acid Market: Analysis By Process Type (Ammonium Sulphate Process, Direct Crystallization Process, and Electrodialysis Process), By Application (1, 4-Butanediol, Plasticizers, Polyester Polyols, Polybutylene Succinate, Solvents & Coatings, and Others), By End-User (Industrial, Pharmaceuticals, Food & Beverages, Personal Care & Cosmetics and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2030

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Abstracts

The global bio-succinic acid market was valued at US$147.67 million in 2024. The market value is expected to reach US$311.39 million by 2030. Bio-succinic acid is a renewable, plant-based alternative to petroleum-derived succinic acid, produced through fermentation of plant sugars. It is used in various industries such as bioplastics, pharmaceuticals, food, and personal care products, offering an eco-friendly solution to replace petrochemical-based chemicals.

In the forthcoming years, the bio-succinic acid market is expected to continue growing due to several converging trends. One key factor is the increasing demand for sustainable and eco-friendly alternatives to petrochemical-based products. Bio-succinic acid, derived from renewable biomass sources, offers a greener solution for the production of plastics, solvents, and other chemicals, aligning with global efforts to reduce carbon emissions and dependence on fossil fuels. The growing emphasis on sustainability and the need for biodegradable plastics, particularly in packaging and consumer goods industries, is further fueling the demand for bio-succinic acid. Technological advancements in bioengineering and fermentation processes are also

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enhancing the efficiency and cost-effectiveness of bio-succinic acid production. Moreover, governments worldwide are implementing favorable policies and incentives to promote the adoption of renewable resources and green chemistry, which are accelerating the shift toward bio-based chemicals like bio-succinic acid. Together, these factors position the global bio-succinic acid market for steady growth in the years ahead. The market is expected to grow at a CAGR of approx. 13% during the forecasted period of 2025-2030.

Market Segmentation Analysis:

By Process Type: The report provides the bifurcation of the bio-succinic acid market into three segments on the basis of process type: Ammonium Sulphate Process, Direct Crystallization Process, and Electrodialysis Process. The ammonium sulphate process segment held a significant share of the global market. The method's simplicity, lower energy consumption, and the growing demand for sustainable, bio-based chemicals contribute to its continued dominance. Additionally, governmental incentives for green chemistry and the rising preference for eco-friendly alternatives to petrochemical-based products support its growth. As industries seek greener solutions, the ammonium sulfate process remains a preferred choice for large-scale bio-succinic acid production, with potential for further improvements in sustainability and cost-efficiency.

By Application: The report provides the bifurcation of the bio-succinic acid market into six segments on the basis of application: 1, 4-Butanediol, Polyester Polyols, Plasticizers, Polybutylene Succinate, Solvents & Coatings, and Others. 1, 4-Butanediol is the largest segment of the global bio-succinic acid market. The demand for bio-based BDO is driven by the growing need for eco-friendly chemicals and materials, particularly in industries like automotive, textiles, and electronics. The increasing adoption of green chemistry and rising regulatory pressure to reduce carbon footprints are key factors supporting the growth of the bio-based BDO segment. As industries shift toward sustainable production methods, the 1, 4-butanediol segment is poised for continuous growth, driven by advancements in bio-based production processes.

By End User: The report provides the split of global bio-succinic acid market into five segments in terms of end-user: Industrial, Food & Beverages, Pharmaceuticals, Personal Care & Cosmetics and Others. The industrial segment holds the highest market share in the global bio-succinic acid market due to several factors. First, bio-succinic acid is widely used in the production of bio-based plastics, which are increasingly in demand for their eco-friendly properties. Second, it serves as a key intermediate in manufacturing solvents, coatings, and adhesives, all of which are

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integral to various industrial applications. Third, the growing emphasis on sustainable materials in industries such as packaging, automotive, and textiles further drives demand. Additionally, technological advancements in bio-succinic acid production processes have made it a more cost-effective and scalable option for industrial uses. These factors collectively position the industrial segment as the largest contributor to the bio-succinic acid market.

By Region: In the report, the global bio-succinic acid market is divided into four regions: North America (the US, Canada, and Mexico), Europe (Germany, UK, France, Italy, and Rest of Europe), Asia Pacific (China, Japan, India, South Korea, and rest of Asia Pacific), and Rest of the World. In 2024, the Europe region led the bio-succinic acid market, propelled by propelled by several key factors. Europe has a strong commitment to sustainability, with stringent environmental regulations that promote the use of renewable, bio-based chemicals like bio-succinic acid. The region also hosts major bio-succinic acid producers and has well-established bio-manufacturing infrastructure, which supports the growth of the market. In addition, policies across the European Union focus on reducing carbon emissions and promoting green chemistry, encouraging the adoption of bio-succinic acid in industries such as packaging, automotive, and consumer good.

During 2025-2030, the US is forecasted to maintain its lead within the North America bio-succinic acid market, due to a strong focus on sustainability driven by consumer demand and government policies promoting renewable energy and green chemistry, advanced manufacturing capabilities, and leading bio-succinic acid producers. The growing adoption of bio-based chemicals in industries such as packaging, and consumer goods, along with increasing investments in research and development to improve bio-succinic acid production technologies, also contribute to the US maintaining its dominant position in the region.

Market Dynamics:

Growth Drivers: The global bio-succinic acid market growth is predicted to be supported by numerous growth drivers such as accelerating demand for bio-based plastics and polymers, growing application in food additives, government regulations and policies favoring bio-based products, rising integration with renewable energy sources, and many other factors. The growing shift toward sustainability and eco-friendly products is a key driver of the global bio-succinic acid market. As environmental concerns rise, consumers, businesses, and governments are focusing on reducing carbon footprints and adopting renewable alternatives to petroleum-based products. Bio-succinic acid,

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derived from renewable resources like corn and sugarcane, offers a biodegradable and environmentally friendly option with lower greenhouse gas emissions and energy requirements compared to petrochemical-based succinic acid. This demand for sustainable products is evident across industries like packaging, automotive, textiles, and personal care. Stricter environmental regulations and the push for a circular economy further drive the adoption of bio-based chemicals like bio-succinic acid, accelerating its market growth.

Challenges: However, the market growth would be negatively impacted by various challenges such as high production costs compared to petroleum-based alternatives, limited availability of cost-effective feedstocks, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as expanding applications in pharmaceuticals, technological advancements in the production processes, adoption of circular economy models, collaboration between biotechnology and chemical industries, etc. The surging focus on renewable feedstocks is becoming a key trend in the bio-succinic acid market due to the shift from food-based feedstocks like corn and sugarcane to non-food biomass such as agricultural waste, forest residues, and algae, which reduces competition with food resources and addresses sustainability concerns. The use of lignocellulosic biomass, including materials like straw and wood, provides a more cost-effective and environmentally friendly source of carbon. This change also lowers greenhouse gas emissions and production costs, leading to more efficient and eco-friendly manufacturing processes. As renewable feedstocks become more accessible and economically viable, they enable larger-scale production of bio-succinic acid, meeting the rising demand for sustainable products in industries like packaging and consumer goods. This focus on renewable feedstocks accelerates the adoption of bio-succinic acid, driving market growth.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic significantly disrupted the global bio-succinic acid market due to supply chain disruptions, reduced demand in key industries, and delays in production. Many bio-succinic acid manufacturers faced challenges in sourcing raw materials and maintaining production schedules. However, post-pandemic recovery, along with a renewed focus on sustainability and green chemistry, is driving the market's rebound. The growing demand for eco-friendly alternatives to petroleum-based chemicals, coupled with advancements in bio-manufacturing technologies, is fueling market growth. Additionally, the increasing adoption of renewable feedstocks and stricter environmental

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regulations in the post-COVID era are further accelerating the adoption of bio-succinic acid across industries like packaging, textiles, and consumer goods. The post-COVID impact has also led to increased investments in sustainable practices, creating a favorable environment for the bio-succinic acid market to thrive in the coming years.

Competitive Landscape:

The global bio-succinic acid market is primarily concentrated among leading chemical manufacturers, however, the presence of smaller companies introduces a level of fragmentation, resulting in a market that is largely concentrated with pockets of fragmentation. The key players in the global bio-succinic acid market are:

BASF SE
DSM-Firmenich AG
Roquette Freres SA
Mitsui & Co., Ltd.
Mitsubishi Chemical Group Corporation
PTT Global Chemical Public Company Limited (PTTGC)
Nippon Shokubai Co., Ltd
Dow Inc. (The Dow Chemical Company)
Corbion N.V.
Air Water Inc. (Air Water Performance Chemical Inc.)
LCY Chemical Corp.
Wego Chemical Group

The key players also focus on strategies such as investments in research and development activities, and expanding production capacities. For instance, in September 2024, Mitsubishi Corporation and Exxon Mobil Corporation have signed a Project Framework Agreement for Mitsubishi Corporation's participation in ExxonMobil's facility in Baytown, Texas which is expected to produce virtually carbon-free hydrogen with approximately 98% of carbon dioxide (CO2) removed and low-carbon ammonia. Similarly, in July 2024, BASF and ENGIE signed a 7-year Biomethane Purchase Agreement (BPA). Under the BPA, ENGIE will supply BASF with 2.7 to 3.0 terawatt hours of biomethane throughout the term of the agreement. BASF uses certified biomethane at its Ludwigshafen/Germany and Antwerp/Belgium sites as a sustainable alternative to fossil raw materials in its manufacturing process.

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Contents

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4. REGIONAL MARKET ANALYSIS

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5. IMPACT OF COVID-19

6. MARKET DYNAMICS

7. COMPETITIVE LANDSCAPE

8. COMPANY PROFILES

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List Of Figures

LIST OF FIGURES

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