

Global Bio-based Polyurethane Competitive Landscape Professional Research Report 2025

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Abstracts

Market Overview

According to DIResearch's in-depth investigation and research, the global Bio-based Polyurethane market size will reach 37.94 Million USD in 2025 and is projected to reach 54.35 Million USD by 2032, with a CAGR of 5.27% (2025-2032). Notably, the China Bio-based Polyurethane market has changed rapidly in the past few years. By 2025, China's market size is expected to be Million USD, representing approximately % of the global market share.

Research Summary

Bio-based polyurethane is a type of polyurethane plastic that is derived from renewable biomass sources instead of fossil fuels. Polyurethane is a versatile polymer known for its wide range of applications, including foams, coatings, adhesives, elastomers, and flexible or rigid plastics. Bio-based polyurethane is produced using bio-based polyols, which are derived from renewable resources such as plant oils, starches, or biomass feedstocks. These bio-based polyols are combined with isocyanates to form the polyurethane polymer. The resulting bio-based polyurethane exhibits similar properties and functionality to its petroleum-based counterpart. The use of bio-based polyols in polyurethane production offers several environmental benefits. It reduces reliance on fossil fuels, decreases carbon emissions, and contributes to the development of a more sustainable and circular economy. Bio-based polyurethane has a lower carbon footprint compared to traditional polyurethane derived from petrochemical sources. Bio-based polyurethane can be formulated to meet specific performance requirements for various applications. It can be used to produce flexible or rigid foams, providing cushioning and insulation properties in mattresses, furniture, and automotive seating. Bio-based

polyurethane can also be used in coatings and adhesives, offering durability and adhesion in applications such as paints, adhesives, and sealants. Research and development efforts are ongoing to optimize the production processes and improve the performance of bio-based polyurethane. This includes exploring new bio-based polyol sources, developing sustainable synthesis methods, and enhancing the overall sustainability and functionality of bio-based polyurethane. The utilization of bio-based polyurethane supports sustainability goals by reducing dependence on non-renewable resources and mitigating environmental impacts. It offers opportunities for industries to transition to more renewable and eco-friendly materials while maintaining the versatility and performance of polyurethane.

The major global manufacturers of Bio-based Polyurethane include BASF, Lubrizol, Dow Chemical, SNP, Mitsui Chemicals, Rampf Holding, Johnson Controls, Rhino Linings, Bayer Material, Woodbridge Foam, Malama Composites, TSE Industries, etc. The global players competition landscape in this report is divided into three tiers. The first tier comprises global leading enterprises that command a substantial market share, hold a dominant industry position, possess strong competitiveness and influence, and generate significant revenue. The second tier includes companies with a notable market presence and reputation; these firms actively follow industry leaders in product, service, or technological innovation and maintain a moderate revenue scale. The third tier consists of smaller companies with limited market share and lower brand recognition, primarily focused on local markets and generating comparatively lower revenue.

This report studies the market size, price trends and future development prospects of Bio-based Polyurethane. Focus on analysing the market share, product portfolio, prices, sales, revenue and gross profit margin of global major manufacturers, as well as the market status and trends of different product types and applications in the global Bio-based Polyurethane market. The report data covers historical data from 2020 to 2024, based year in 2025 and forecast data from 2026 to 2032.

The regions and countries in the report include North America, Europe, China, APAC (excl. China), Latin America and Middle East and Africa, covering the Bio-based Polyurethane market conditions and future development trends of key regions and countries, combined with industry-related policies and the latest technological developments, analyze the development characteristics of Bio-based Polyurethane industries in various regions and countries, help companies understand the development characteristics of each region, help companies formulate business strategies, and achieve the ultimate goal of the company's global development strategy.

The data sources of this report mainly include the National Bureau of Statistics, customs databases, industry associations, corporate financial reports, third-party databases, etc. Among them, macroeconomic data mainly comes from the National Bureau of Statistics, International Economic Research Organization; industry statistical data mainly come from industry associations; company data mainly comes from interviews, public information collection, third-party reliable databases, and price data mainly comes from various markets monitoring database.

Global Key Manufacturers of Bio-based Polyurethane Include:

BASF

Lubrizol

Dow Chemical

SNP

Mitsui Chemicals

Rampf Holding

Johnson Controls

Rhino Linings

Bayer Material

Woodbridge Foam

Malama Composites

TSE Industries

Bio-based Polyurethane Product Segment Include:

Rigid Foams

Flexible Foams

Case (Coatings

Adhesives

Sealants and Elastomers)

Others

Bio-based Polyurethane Product Application Include:

Construction

Automotive

Electronics & Electrical Appliances

Others

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