

# Global Biobased Sizing Chemicals Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Biobased Sizing Chemicals market size was valued at US\$ 686 million in 2025 and is forecast to a readjusted size of US\$ 829 million by 2032 with a CAGR of 2.8% during review period.

Biobased sizing chemicals are papermaking additives derived primarily from renewable feedstocks such as starch, rosin, and selected plant-oil chemistries, designed to reduce liquid uptake and improve surface integrity by forming a thin functional layer on fibers or on the sheet surface during size press or film press application. In value chains they sit between agricultural or forestry-based raw materials and paper mills, and they are selected not only for hydrophobizing performance but also for runnability, pick resistance, printability, and compatibility with fillers, retention systems, and coating operations. Commercial differentiation is typically built around controlled molecular modification, consistent viscosity and solids delivery, deposit control, and application engineering that tailors formulation to machine speed, furnish mix, and end-use requirements across packaging, printing, tissue, and specialty grades.

In the current market, global production is around 980 kilo metric ton, with an average selling price of about 680 USD per metric ton EXW basis. Industry concentration is moderate because the volume base is anchored by large starch processors while performance-critical niches rely on specialized papermaking chemical suppliers with application support and mill qualification know-how; as a result, the top suppliers collectively account for about 35% of global revenue as measured by CR5. Regional consumption is led by Asia Pacific due to the scale of packaging and board production, followed by Europe and North America where higher-performance packaging and printing grades sustain demand for consistent surface properties, and where

qualification and supplier approval cycles reinforce incumbent positions. Typical gross margin for this product family is estimated at 27%, reflecting a mix of commodity-like starch derivatives and more specialized rosin or bio-based functional chemistries sold with technical service, while still facing cost pass-through pressure tied to agricultural and forestry feedstock volatility.

Looking ahead, demand is expected to grow steadily through 2026 to 2032 as paper-based packaging continues to substitute for plastics in selected applications and as brand owners tighten sustainability claims that favor renewable-content additives, provided performance can match barrier and print requirements. At the same time, the market will remain constrained by mill economics and by the availability and cost of renewable feedstocks, pushing suppliers toward higher-efficiency chemistries, improved application windows, and tighter control of deposits and foaming. Competitive dynamics will likely intensify around bio-based solutions that can deliver hydrophobicity and surface strength at lower add-on, enabling mills to balance sustainability targets with productivity and quality consistency across fast-running machines.

This report is a detailed and comprehensive analysis for global Biobased Sizing Chemicals market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Application Stage and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

### **Key Features:**

Global Biobased Sizing Chemicals market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Biobased Sizing Chemicals market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Biobased Sizing Chemicals market size and forecasts, by Application Stage and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Biobased Sizing Chemicals market shares of main players, shipments in

revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

### **The Primary Objectives in This Report Are:**

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Biobased Sizing Chemicals

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Biobased Sizing Chemicals market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Cargill, Ingredion, Primient, AGRANA, Roquette, Royal Avebe, Galam, Chemigate, Hangzhou Papermate Science And Technology, Kemira, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### **Market Segmentation**

Biobased Sizing Chemicals market is split by Application Stage and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Application Stage, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### **Market segment by Application Stage**

Wet End Internal Sizing

Size Press Surface Sizing

Coating Color Sizing Additive

Multi Stage Sizing

#### **Market segment by Biobased Platform**

Starch Based

Rosin Tall Oil Based

Cellulose Derivative Based

Fatty Acid Based

Lignin Based

Other Biobased

#### Market segment by Physical Form

Powder

Granule

Liquid Solution

Aqueous Dispersion

Emulsion

#### Market segment by Application

Packaging Paperboard

Printing Writing Paper

Tissue Hygiene Paper

Specialty Industrial Paper

Others

## Major players covered

Cargill

Ingredion

Primient

AGRANA

Roquette

Royal Avebe

Galam

Chemigate

Hangzhou Papermate Science And Technology

Kemira

Solenis

Arakawa Chemical Industries

Harima Chemicals Group

Plasmine Technology

Tereos

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East)

& Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Biobased Sizing Chemicals product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Biobased Sizing Chemicals, with price, sales quantity, revenue, and global market share of Biobased Sizing Chemicals from 2021 to 2026.

Chapter 3, the Biobased Sizing Chemicals competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Biobased Sizing Chemicals breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Application Stage and by Application, with sales market share and growth rate by Application Stage, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Biobased Sizing Chemicals market forecast, by regions, by Application Stage, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Biobased Sizing Chemicals.

Chapter 14 and 15, to describe Biobased Sizing Chemicals sales channel, distributors, customers, research findings and conclusion.

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