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Global Antioxidants for Biodegradable Plastic Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Antioxidants for Biodegradable Plastic market size is expected to reach $ 69.50 million by 2032, rising at a market growth of 11.5% CAGR during the forecast period (2026-2032).

Antioxidants for Biodegradable Plastic, referred to in this study as antioxidant additives for biodegradable plastics, are polymer stabilizing additives used to suppress thermo-oxidative degradation during resin production, compounding, melt processing and the defined service life of biodegradable plastics. The market covers commercially supplied antioxidant additives used in biodegradable polymer systems such as PLA, PBAT, PBS/PBSA, PHA and starch-based biodegradable blends, including synthetic antioxidants and bio-based or natural-derived antioxidants whose principal function is polymer oxidation stabilization. Typical products are supplied as powders, granules, flakes or liquids and are incorporated at relatively low addition levels to reduce molecular-weight loss, discoloration, viscosity deterioration and mechanical-property degradation caused by heat and oxygen. Market revenue corresponds to sales of antioxidant additives supplied directly to biodegradable resin producers, compounders and plastics processors for flexible packaging, compostable bags, agricultural films, rigid foodservice articles, biodegradable fibres, nonwovens and related products. The statistical boundary remains at the polymer-additive level and therefore excludes antioxidant chemical intermediates, polymer-carrier antioxidant masterbatches, finished biodegradable compounds, biodegradable resins themselves, UV stabilizers, hydrolysis stabilizers, chain extenders, plasticizers and other additives whose principal function is not oxidation stabilization.

Key Findings

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Demand is expanding with the commercialization of PLA PBAT PBS PHA and other biodegradable polymer systems across packaging agriculture fibres and consumer products

Flexible packaging and compostable bags represent the most important downstream demand pool as packaging remains the largest application segment within the broader bioplastics industry

Synthetic antioxidants remain the mainstream commercial solution while bio-based and natural-derived antioxidants are gaining strategic relevance under lower-carbon formulation strategies

Competition is led by established polymer-additive manufacturers rather than dedicated biodegradable-plastic antioxidant suppliers

Recent supplier actions show increasing emphasis on renewable feedstocks supply reliability and raw-material cost management

Market Trends

The long-term development of antioxidant additives for biodegradable plastics is being shaped by the need to balance processing stability with controlled end-of-life performance. Biodegradable polyesters such as PLA, PBAT and PBS can experience molecular-weight reduction, discoloration and mechanical-property deterioration during high-temperature extrusion and repeated thermal histories, increasing the importance of antioxidant packages that provide sufficient processing protection without materially interfering with biodegradation or compostability requirements. Formulators are therefore moving toward lower-dosage, high-efficiency stabilization systems, improved compatibility with biodegradable polyester matrices and combinations of primary and secondary stabilization mechanisms that reduce thermal degradation during film extrusion, fibre spinning, injection moulding and compounding. At the same time, material sustainability is beginning to extend from the polymer itself to the additive package. BASF already markets antioxidant products containing measurable biorenewable carbon, while SONGWON introduced an RSPO-certified SONGNOX® 1076 option in 2026, illustrating a broader shift toward renewable or certified feedstock sourcing without sacrificing conventional antioxidant performance.

Latest Developments / News

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Recent industry developments reflect simultaneous changes in downstream biodegradable plastics demand, additive sustainability and cost conditions. In December 2025, European Bioplastics reported continued expansion of biobased and biodegradable polymer capacity, with packaging remaining the largest application segment in the wider bioplastics market, reinforcing demand for stabilizer packages used in film, coating and packaging conversion. In February 2025, the EU Packaging and Packaging Waste Regulation entered into force, and from August 12, 2026 its provisions began to apply on a phased basis; the regulation narrows compostable packaging toward applications where biological treatment provides a demonstrable benefit and introduces clearer requirements for compostability, recyclability and packaging design. Downstream product development also accelerated: BASF expanded its ecovio® portfolio in April 2026 with certified home-compostable grades for flexible barrier packaging, supporting applications such as pouches, sachets, trays and paper-plastic laminates. On the additive side, SONGWON announced in March 2026 a 12–20% global price adjustment for Polymer Stabilizers and Coatings in response to higher raw-material, logistics and margin pressures, followed in July by the introduction of an RSPO-certified SONGNOX® 1076 antioxidant option. These developments indicate that market competition is increasingly influenced not only by antioxidant performance but also by feedstock sustainability, cost control and regulatory suitability within biodegradable formulations.

Market Dynamics

Drivers

The principal demand driver is the continued expansion of biodegradable plastics in packaging, agriculture, fibres, disposable foodservice products and selected consumer applications. European Bioplastics' 2025 market update identifies packaging as the largest application segment in the broader bioplastics industry and highlights continued development of PLA, PHA and other biobased and biodegradable polymers. Greater resin output translates directly into increased additive consumption because biodegradable polyesters still require thermal and processing stabilization during polymerization, compounding and conversion. The need becomes more pronounced as processors pursue thinner films, higher extrusion speeds, recycled process scrap, multilayer structures and more demanding barrier performance, all of which expose polymers to additional thermal history and raise the commercial value of efficient antioxidant systems.

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Restraints

The market is constrained by the relatively small scale of biodegradable plastics compared with the conventional plastics industry and by the technical requirement to preserve a carefully controlled degradation profile. An antioxidant that is highly effective in conventional polyolefins cannot automatically be assumed to be suitable for PLA, PBAT, PBS or PHA because polymer polarity, processing temperature, hydrolysis sensitivity, food-contact requirements and biodegradation targets differ substantially. Customer qualification therefore requires formulation testing rather than simple substitution. Antioxidant suppliers also face cost pressure from phenolic, phosphite and other chemical feedstocks as well as logistics costs; SONGWON's 2026 polymer-stabilizer price adjustment demonstrates that these cost pressures can be material.

Opportunities

The strongest opportunity lies in developing stabilizer systems specifically optimized for biodegradable polyester processing rather than selling generic antioxidants without formulation support. New opportunities are emerging in high-barrier compostable flexible packaging, home-compostable coatings, agricultural products and high-throughput extrusion applications where improved thermal stability can directly increase processing consistency and reduce scrap. BASF's 2026 expansion of ecovio® into home-compostable flexible barrier structures shows how biodegradable materials are moving into more technically demanding packaging formats, increasing requirements for additive compatibility and processing stability. Bio-based and natural-derived antioxidants represent an additional strategic opportunity, particularly where resin producers and brand owners seek to improve renewable-carbon content across the entire formulation rather than only in the base polymer. Certified sourcing systems, biomass-balance models and naturally derived antioxidant molecules can therefore become higher-value differentiation routes.

Challenges

A central long-term challenge is the tension between stabilization during manufacturing and controlled degradation after use. Excessive stabilization may interfere with intended biodegradation performance, while insufficient stabilization can cause processing instability, discoloration and early deterioration before the product reaches end use. Suppliers must therefore optimize dosage, migration resistance, food-contact compliance and compatibility with compostability standards. Regulation is also

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becoming more application-specific. The EU PPWR makes clear that compostable packaging should be used in defined cases where environmental benefits and suitable waste-treatment infrastructure exist rather than treated as a universal replacement for recyclable packaging. This increases the importance of application-specific formulation expertise and makes it more difficult for suppliers to rely on a single generic biodegradable-plastic additive package across all markets.

Industry Chain Analysis

The upstream value chain includes phenolic intermediates, phosphites, thioesters, alcohols, acids, phosphorus-containing raw materials and, for bio-based or natural-derived products, plant oils, biomass-derived feedstocks and botanical antioxidant sources. Raw-material purity, process yields and feedstock availability determine additive cost and consistency. The middle of the chain consists of antioxidant manufacturers that synthesize active ingredients, purify and formulate products, manage particle form or liquid delivery and provide technical application support. Established manufacturers increasingly combine individual antioxidants with co-stabilizers, while the target market in this study remains focused on independently supplied antioxidant additives rather than polymer-carrier masterbatches or finished compounds. BASF's product portfolio illustrates the functional role of both radical-scavenging primary antioxidants and hydroperoxide-decomposing secondary antioxidants in polymer stabilization.

Downstream demand comes from biodegradable resin producers, compounders, film converters, fibre and nonwoven producers, injection moulders and manufacturers of agricultural and consumer products. The commercial value of the additive is determined less by its absolute usage volume than by its ability to protect resin molecular weight, colour and processability at low dosage. Technical service therefore remains an important competitive factor, particularly when customers transition from conventional plastics to PLA, PBAT, PBS or PHA formulations and need to redesign the overall additive package. Greater use of renewable or certified feedstocks is also linking polymer-additive procurement with broader sustainability and carbon-accounting requirements.

Segment Insights

The confirmed market classification divides products by feedstock origin into Synthetic Antioxidants and Bio-Based and Natural-Derived Antioxidants. Synthetic antioxidants

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currently represent the established commercial mainstream because hindered phenolic, phosphite and related stabilizers offer predictable purity, processing performance, thermal stability and global supply. These products benefit from decades of formulation experience across polymer processing and can be adapted to biodegradable polyester applications through dosage and stabilizer-package optimization. Bio-based and natural-derived antioxidants are a smaller but strategically important segment. Their value proposition is increasingly linked to renewable-carbon content, lower fossil-feedstock dependence and sustainability positioning rather than simply antioxidant activity. BASF discloses biorenewable content in selected antioxidant products, while SONGWON's RSPO-certified SONGNOX® 1076 option demonstrates how conventional high-performance antioxidant chemistry can also incorporate certified renewable sourcing. Future growth in this segment will depend on maintaining processing stability, colour performance, migration resistance and economic competitiveness comparable with synthetic incumbent products.

Downstream Market Opportunities

The confirmed application structure covers flexible packaging and compostable bags, agricultural mulch films and horticultural products, rigid packaging and foodservice articles, biodegradable fibres and nonwovens, consumer goods and 3D printing materials, and other applications. Flexible packaging and compostable bags remain the most commercially important opportunity because packaging accounts for the largest application share in the broader bioplastics industry, while film extrusion subjects biodegradable polymers to demanding thermal-processing conditions. European Bioplastics reported packaging at 41.3% of global bioplastics production capacity in 2025, although this figure covers the wider bioplastics category rather than only biodegradable materials. Agricultural mulch films and horticultural products create another attractive demand pool because soil-biodegradable and compostable products require sufficient processing and service-life stability before controlled degradation. Rigid foodservice articles require colour stability, heat resistance and food-contact-compatible additive selection, while fibres and nonwovens demand stable melt viscosity during high-speed processing. Growth in these applications should favor antioxidants that combine low addition rates with strong processing efficiency and clear regulatory documentation.

Regional Insights

Asia-Pacific is an important production and consumption base because the region

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contains large biodegradable polymer manufacturing capacity, major packaging and textile processing industries and a substantial concentration of polymer-additive manufacturers. China is particularly important for PLA, PBAT and other biodegradable-polymer conversion and also has a growing domestic supply base of antioxidant producers including Tianjin Rianlon New Material Co., Ltd., JIYI CHEMICAL GROUP and Beijing Tiangang Auxiliary Co., Ltd. Europe is more strongly influenced by regulatory requirements concerning compostability, recycling and packaging end-of-life. The PPWR entered into force in February 2025 and began applying in August 2026, establishing a more specific framework for when compostable packaging can be used and how packaging must interact with recycling and bio-waste systems. European Bioplastics also reported continued regional capacity additions in biobased and biodegradable materials, supporting ongoing demand for formulation additives. North America remains an important specialty-additives and PLA application market, with demand driven by compostable packaging, foodservice applications and selected consumer products, while Japan combines a mature polymer-additives industry with comparatively strict quality and formulation requirements. Regional differentiation is therefore determined by the local biodegradable-resin base, waste-management regulation, conversion industry and availability of qualified stabilizer suppliers rather than by a single global formulation standard.

Competitive Landscape Analysis

The confirmed competitive set includes BASF SE, SONGWON Industrial Co., Ltd., ADEKA CORPORATION, SI Group, Inc., Tianjin Rianlon New Material Co., Ltd., Dover Chemical Corporation, Clariant International Ltd, Everspring Chemical Co., Ltd., Chitec Technology Co., Ltd., Double Bond Chemical Ind. Co., Ltd., Sumitomo Chemical Company, Limited, 3V Sigma S.p.A., JIYI CHEMICAL GROUP, Oxiris Chemicals S.A. and Beijing Tiangang Auxiliary Co., Ltd. Competition is characterized by established global polymer-stabilizer suppliers alongside regional specialty-additive manufacturers rather than by companies dedicated exclusively to biodegradable-plastic antioxidants. BASF, SONGWON, ADEKA and SI Group compete through broad antioxidant chemistry portfolios, formulation expertise, global manufacturing and technical-service capabilities, while Tianjin Rianlon New Material Co., Ltd. and other Asian suppliers increasingly compete on integrated anti-aging solutions, regional supply reliability and cost efficiency. Rianlon reports dual-base production capability across its polymer anti-aging additives and more than 300 patents as of December 2025, strengthening its position as a significant Asian supplier. Recent developments show that competition is broadening from conventional performance and price toward feedstock sustainability

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and certified sourcing: SONGWON's RSPO-certified SONGNOX® 1076 and BASF's biorenewable-content antioxidant portfolio illustrate this transition. Future competitive advantage will depend on biodegradable-polyester formulation expertise, application testing, regulatory documentation, low-dose efficiency, renewable-feedstock options and the ability to maintain reliable regional supply.

Report Scope

This report studies the global Antioxidants for Biodegradable Plastic demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Antioxidants for Biodegradable Plastic, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Antioxidants for Biodegradable Plastic that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Antioxidants for Biodegradable Plastic total market, 2021-2032, (USD Million)

Global Antioxidants for Biodegradable Plastic total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Antioxidants for Biodegradable Plastic total market, key domestic companies, and share, (USD Million)

Global Antioxidants for Biodegradable Plastic revenue by player, revenue and market share 2021-2026, (USD Million)

Global Antioxidants for Biodegradable Plastic total market by Active Antioxidant Content Types, CAGR, 2021-2032, (USD Million)

Global Antioxidants for Biodegradable Plastic total market by Application, CAGR, 2021-2032, (USD Million)

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This report profiles major players in the global Antioxidants for Biodegradable Plastic market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BASF SE, SONGWON Industrial Co., Ltd., ADEKA CORPORATION, SI Group, Inc., Tianjin Rianlon New Material Co., Ltd., Dover Chemical Corporation, Clariant International Ltd, Everspring Chemical Co., Ltd., Chitec Technology Co., Ltd., Double Bond Chemical Ind. Co., Ltd., etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Antioxidants for Biodegradable Plastic market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Active Antioxidant Content Types, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Antioxidants for Biodegradable Plastic Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global Antioxidants for Biodegradable Plastic Market, Segmentation by Active Antioxidant Content Types:

Formulated Grade (<95%)

High-Content Grade (95–<99%)

High-Purity Grade (?99%)

Global Antioxidants for Biodegradable Plastic Market, Segmentation by Feedstock Origin Types:

Synthetic Antioxidants

Bio-Based and Natural-Derived Antioxidants

Global Antioxidants for Biodegradable Plastic Market, Segmentation by Antioxidant Mechanism Types:

Primary Antioxidants

Secondary Antioxidants

Multifunctional Antioxidants

Global Antioxidants for Biodegradable Plastic Market, Segmentation by Application:

Flexible Packaging and Compostable Bags

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Agricultural Mulch Films and Horticultural Products

Rigid Packaging and Foodservice Articles

Biodegradable Fibers and Nonwovens

Consumer Goods and 3D Printing Materials

Others

Companies Profiled:

BASF SE

SONGWON Industrial Co., Ltd.

ADEKA CORPORATION

SI Group, Inc.

Tianjin Rianlon New Material Co., Ltd.

Dover Chemical Corporation

Clariant International Ltd

Everspring Chemical Co., Ltd.

Chitec Technology Co., Ltd.

Double Bond Chemical Ind. Co., Ltd.

Sumitomo Chemical Company, Limited

3V Sigma S.p.A.

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JIYI CHEMICAL GROUP

Oxiris Chemicals S.A.

Beijing Tiangang Auxiliary Co., Ltd

Key Questions Answered

1. How big is the global Antioxidants for Biodegradable Plastic market?
2. What is the demand of the global Antioxidants for Biodegradable Plastic market?
3. What is the year over year growth of the global Antioxidants for Biodegradable Plastic market?
4. What is the total value of the global Antioxidants for Biodegradable Plastic market?
5. Who are the Major Players in the global Antioxidants for Biodegradable Plastic market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Antioxidants for Biodegradable Plastic Introduction
1.2 World Antioxidants for Biodegradable Plastic Market Size & Forecast (2021 & 2025 & 2032)
1.3 World Antioxidants for Biodegradable Plastic Total Market by Region (by Headquarter Location)
  1.3.1 World Antioxidants for Biodegradable Plastic Market Size by Region (2021-2032), (by Headquarter Location)
  1.3.2 United States Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
  1.3.3 China Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
  1.3.4 Europe Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
  1.3.5 Japan Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
  1.3.6 South Korea Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
  1.3.7 ASEAN Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
  1.3.8 India Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Antioxidants for Biodegradable Plastic Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Major Market Trends

2 DEMAND SUMMARY

2.1 World Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)
2.2 World Antioxidants for Biodegradable Plastic Consumption Value by Region
  2.2.1 World Antioxidants for Biodegradable Plastic Consumption Value by Region (2021-2026)
  2.2.2 World Antioxidants for Biodegradable Plastic Consumption Value Forecast by Region (2027-2032)
2.3 United States Antioxidants for Biodegradable Plastic Consumption Value

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(2021-2032)
2.4 China Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)
2.5 Europe Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)
2.6 Japan Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)
2.7 South Korea Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)
2.8 ASEAN Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)
2.9 India Antioxidants for Biodegradable Plastic Consumption Value (2021-2032)

3 WORLD ANTIOXIDANTS FOR BIODEGRADABLE PLASTIC COMPANIES COMPETITIVE ANALYSIS

3.1 World Antioxidants for Biodegradable Plastic Revenue by Player (2021-2026)
3.2 Industry Rank and Concentration Rate (CR)
  3.2.1 Global Antioxidants for Biodegradable Plastic Industry Rank of Major Players
  3.2.2 Global Concentration Ratios (CR4) for Antioxidants for Biodegradable Plastic in 2025
  3.2.3 Global Concentration Ratios (CR8) for Antioxidants for Biodegradable Plastic in 2025
3.3 Antioxidants for Biodegradable Plastic Company Evaluation Quadrant
3.4 Antioxidants for Biodegradable Plastic Market: Overall Company Footprint Analysis
  3.4.1 Antioxidants for Biodegradable Plastic Market: Region Footprint
  3.4.2 Antioxidants for Biodegradable Plastic Market: Company Product Type Footprint
  3.4.3 Antioxidants for Biodegradable Plastic Market: Company Product Application Footprint
3.5 Competitive Environment
  3.5.1 Historical Structure of the Industry
  3.5.2 Barriers of Market Entry
  3.5.3 Factors of Competition
3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

4.1 United States VS China: Antioxidants for Biodegradable Plastic Revenue Comparison (by Headquarter Location)
  4.1.1 United States VS China: Antioxidants for Biodegradable Plastic Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
  4.1.2 United States VS China: Antioxidants for Biodegradable Plastic Revenue Market

+357 96 030922
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Share Comparison (2021 & 2025 & 2032)
4.2 United States Based Companies VS China Based Companies: Antioxidants for Biodegradable Plastic Consumption Value Comparison
4.2.1 United States VS China: Antioxidants for Biodegradable Plastic Consumption Value Comparison (2021 & 2025 & 2032)
4.2.2 United States VS China: Antioxidants for Biodegradable Plastic Consumption Value Market Share Comparison (2021 & 2025 & 2032)
4.3 United States Based Antioxidants for Biodegradable Plastic Companies and Market Share, 2021-2026
4.3.1 United States Based Antioxidants for Biodegradable Plastic Companies, Headquarters (States, Country)
4.3.2 United States Based Companies Antioxidants for Biodegradable Plastic Revenue, (2021-2026)
4.4 China Based Companies Antioxidants for Biodegradable Plastic Revenue and Market Share, 2021-2026
4.4.1 China Based Antioxidants for Biodegradable Plastic Companies, Company Headquarters (Province, Country)
4.4.2 China Based Companies Antioxidants for Biodegradable Plastic Revenue, (2021-2026)
4.5 Rest of World Based Antioxidants for Biodegradable Plastic Companies and Market Share, 2021-2026
4.5.1 Rest of World Based Antioxidants for Biodegradable Plastic Companies, Headquarters (Province, Country)
4.5.2 Rest of World Based Companies Antioxidants for Biodegradable Plastic Revenue (2021-2026)

5 MARKET ANALYSIS BY ACTIVE ANTIOXIDANT CONTENT TYPES

5.1 World Antioxidants for Biodegradable Plastic Market Size Overview by Active Antioxidant Content Types: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Active Antioxidant Content Types
5.2.1 Formulated Grade (<95%)
5.2.2 High-Content Grade (95–<99%)
5.2.3 High-Purity Grade (?99%)
5.3 Market Segment by Active Antioxidant Content Types
5.3.1 World Antioxidants for Biodegradable Plastic Market Size by Active Antioxidant Content Types (2021-2026)
5.3.2 World Antioxidants for Biodegradable Plastic Market Size by Active Antioxidant Content Types (2027-2032)

+357 96 030922
info@marketpublishers.com

5.3.3 World Antioxidants for Biodegradable Plastic Market Size Market Share by Active Antioxidant Content Types (2027-2032)

6 MARKET ANALYSIS BY FEEDSTOCK ORIGIN TYPES

6.1 World Antioxidants for Biodegradable Plastic Market Size Overview by Feedstock Origin Types: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Feedstock Origin Types
6.2.1 Synthetic Antioxidants
6.2.2 Bio-Based and Natural-Derived Antioxidants
6.3 Market Segment by Feedstock Origin Types
6.3.1 World Antioxidants for Biodegradable Plastic Market Size by Feedstock Origin Types (2021-2026)
6.3.2 World Antioxidants for Biodegradable Plastic Market Size by Feedstock Origin Types (2027-2032)
6.3.3 World Antioxidants for Biodegradable Plastic Market Size Market Share by Feedstock Origin Types (2027-2032)

7 MARKET ANALYSIS BY ANTIOXIDANT MECHANISM TYPES

7.1 World Antioxidants for Biodegradable Plastic Market Size Overview by Antioxidant Mechanism Types: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Antioxidant Mechanism Types
7.2.1 Primary Antioxidants
7.2.2 Secondary Antioxidants
7.2.3 Multifunctional Antioxidants
7.3 Market Segment by Antioxidant Mechanism Types
7.3.1 World Antioxidants for Biodegradable Plastic Market Size by Antioxidant Mechanism Types (2021-2026)
7.3.2 World Antioxidants for Biodegradable Plastic Market Size by Antioxidant Mechanism Types (2027-2032)
7.3.3 World Antioxidants for Biodegradable Plastic Market Size Market Share by Antioxidant Mechanism Types (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Antioxidants for Biodegradable Plastic Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application

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info@marketpublishers.com

8.2.1 Flexible Packaging and Compostable Bags
8.2.2 Agricultural Mulch Films and Horticultural Products
8.2.3 Rigid Packaging and Foodservice Articles
8.2.4 Biodegradable Fibers and Nonwovens
8.2.5 Consumer Goods and 3D Printing Materials
8.2.6 Others
8.3 Market Segment by Application
8.3.1 World Antioxidants for Biodegradable Plastic Market Size by Application (2021-2026)
8.3.2 World Antioxidants for Biodegradable Plastic Market Size by Application (2027-2032)
8.3.3 World Antioxidants for Biodegradable Plastic Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 BASF SE
9.1.1 BASF SE Details
9.1.2 BASF SE Major Business
9.1.3 BASF SE Antioxidants for Biodegradable Plastic Product and Services
9.1.4 BASF SE Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.1.5 BASF SE Recent Developments/Updates
9.1.6 BASF SE Competitive Strengths & Weaknesses
9.2 SONGWON Industrial Co., Ltd.
9.2.1 SONGWON Industrial Co., Ltd. Details
9.2.2 SONGWON Industrial Co., Ltd. Major Business
9.2.3 SONGWON Industrial Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
9.2.4 SONGWON Industrial Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.2.5 SONGWON Industrial Co., Ltd. Recent Developments/Updates
9.2.6 SONGWON Industrial Co., Ltd. Competitive Strengths & Weaknesses
9.3 ADEKA CORPORATION
9.3.1 ADEKA CORPORATION Details
9.3.2 ADEKA CORPORATION Major Business
9.3.3 ADEKA CORPORATION Antioxidants for Biodegradable Plastic Product and Services
9.3.4 ADEKA CORPORATION Antioxidants for Biodegradable Plastic Revenue, Gross

+357 96 030922
info@marketpublishers.com

Margin and Market Share (2021-2026)
9.3.5 ADEKA CORPORATION Recent Developments/Updates
9.3.6 ADEKA CORPORATION Competitive Strengths & Weaknesses
9.4 SI Group, Inc.
9.4.1 SI Group, Inc. Details
9.4.2 SI Group, Inc. Major Business
9.4.3 SI Group, Inc. Antioxidants for Biodegradable Plastic Product and Services
9.4.4 SI Group, Inc. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.4.5 SI Group, Inc. Recent Developments/Updates
9.4.6 SI Group, Inc. Competitive Strengths & Weaknesses
9.5 Tianjin Rianlon New Material Co., Ltd.
9.5.1 Tianjin Rianlon New Material Co., Ltd. Details
9.5.2 Tianjin Rianlon New Material Co., Ltd. Major Business
9.5.3 Tianjin Rianlon New Material Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
9.5.4 Tianjin Rianlon New Material Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.5.5 Tianjin Rianlon New Material Co., Ltd. Recent Developments/Updates
9.5.6 Tianjin Rianlon New Material Co., Ltd. Competitive Strengths & Weaknesses
9.6 Dover Chemical Corporation
9.6.1 Dover Chemical Corporation Details
9.6.2 Dover Chemical Corporation Major Business
9.6.3 Dover Chemical Corporation Antioxidants for Biodegradable Plastic Product and Services
9.6.4 Dover Chemical Corporation Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.6.5 Dover Chemical Corporation Recent Developments/Updates
9.6.6 Dover Chemical Corporation Competitive Strengths & Weaknesses
9.7 Clariant International Ltd
9.7.1 Clariant International Ltd Details
9.7.2 Clariant International Ltd Major Business
9.7.3 Clariant International Ltd Antioxidants for Biodegradable Plastic Product and Services
9.7.4 Clariant International Ltd Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.7.5 Clariant International Ltd Recent Developments/Updates
9.7.6 Clariant International Ltd Competitive Strengths & Weaknesses
9.8 Everspring Chemical Co., Ltd.

+357 96 030922
info@marketpublishers.com

9.8.1 Everspring Chemical Co., Ltd. Details
9.8.2 Everspring Chemical Co., Ltd. Major Business
9.8.3 Everspring Chemical Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
9.8.4 Everspring Chemical Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.8.5 Everspring Chemical Co., Ltd. Recent Developments/Updates
9.8.6 Everspring Chemical Co., Ltd. Competitive Strengths & Weaknesses
9.9 Chitec Technology Co., Ltd.
9.9.1 Chitec Technology Co., Ltd. Details
9.9.2 Chitec Technology Co., Ltd. Major Business
9.9.3 Chitec Technology Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
9.9.4 Chitec Technology Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.9.5 Chitec Technology Co., Ltd. Recent Developments/Updates
9.9.6 Chitec Technology Co., Ltd. Competitive Strengths & Weaknesses
9.10 Double Bond Chemical Ind. Co., Ltd.
9.10.1 Double Bond Chemical Ind. Co., Ltd. Details
9.10.2 Double Bond Chemical Ind. Co., Ltd. Major Business
9.10.3 Double Bond Chemical Ind. Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
9.10.4 Double Bond Chemical Ind. Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.10.5 Double Bond Chemical Ind. Co., Ltd. Recent Developments/Updates
9.10.6 Double Bond Chemical Ind. Co., Ltd. Competitive Strengths & Weaknesses
9.11 Sumitomo Chemical Company, Limited
9.11.1 Sumitomo Chemical Company, Limited Details
9.11.2 Sumitomo Chemical Company, Limited Major Business
9.11.3 Sumitomo Chemical Company, Limited Antioxidants for Biodegradable Plastic Product and Services
9.11.4 Sumitomo Chemical Company, Limited Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.11.5 Sumitomo Chemical Company, Limited Recent Developments/Updates
9.11.6 Sumitomo Chemical Company, Limited Competitive Strengths & Weaknesses
9.12 3V Sigma S.p.A.
9.12.1 3V Sigma S.p.A. Details
9.12.2 3V Sigma S.p.A. Major Business
9.12.3 3V Sigma S.p.A. Antioxidants for Biodegradable Plastic Product and Services

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9.12.4 3V Sigma S.p.A. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.12.5 3V Sigma S.p.A. Recent Developments/Updates
9.12.6 3V Sigma S.p.A. Competitive Strengths & Weaknesses
9.13 JIYI CHEMICAL GROUP
9.13.1 JIYI CHEMICAL GROUP Details
9.13.2 JIYI CHEMICAL GROUP Major Business
9.13.3 JIYI CHEMICAL GROUP Antioxidants for Biodegradable Plastic Product and Services
9.13.4 JIYI CHEMICAL GROUP Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.13.5 JIYI CHEMICAL GROUP Recent Developments/Updates
9.13.6 JIYI CHEMICAL GROUP Competitive Strengths & Weaknesses
9.14 Oxiris Chemicals S.A.
9.14.1 Oxiris Chemicals S.A. Details
9.14.2 Oxiris Chemicals S.A. Major Business
9.14.3 Oxiris Chemicals S.A. Antioxidants for Biodegradable Plastic Product and Services
9.14.4 Oxiris Chemicals S.A. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.14.5 Oxiris Chemicals S.A. Recent Developments/Updates
9.14.6 Oxiris Chemicals S.A. Competitive Strengths & Weaknesses
9.15 Beijing Tiangang Auxiliary Co., Ltd
9.15.1 Beijing Tiangang Auxiliary Co., Ltd Details
9.15.2 Beijing Tiangang Auxiliary Co., Ltd Major Business
9.15.3 Beijing Tiangang Auxiliary Co., Ltd Antioxidants for Biodegradable Plastic Product and Services
9.15.4 Beijing Tiangang Auxiliary Co., Ltd Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026)
9.15.5 Beijing Tiangang Auxiliary Co., Ltd Recent Developments/Updates
9.15.6 Beijing Tiangang Auxiliary Co., Ltd Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Antioxidants for Biodegradable Plastic Industry Chain
10.2 Antioxidants for Biodegradable Plastic Upstream Analysis
10.3 Antioxidants for Biodegradable Plastic Midstream Analysis
10.4 Antioxidants for Biodegradable Plastic Downstream Analysis

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11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Antioxidants for Biodegradable Plastic Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Table 2. World Antioxidants for Biodegradable Plastic Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)
Table 3. World Antioxidants for Biodegradable Plastic Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)
Table 4. World Antioxidants for Biodegradable Plastic Revenue Market Share by Region (2021-2026), (by Headquarter Location)
Table 5. World Antioxidants for Biodegradable Plastic Revenue Market Share by Region (2027-2032), (by Headquarter Location)
Table 6. Major Market Trends
Table 7. World Antioxidants for Biodegradable Plastic Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)
Table 8. World Antioxidants for Biodegradable Plastic Consumption Value by Region (2021-2026) & (USD Million)
Table 9. World Antioxidants for Biodegradable Plastic Consumption Value Forecast by Region (2027-2032) & (USD Million)
Table 10. World Antioxidants for Biodegradable Plastic Revenue by Player (2021-2026) & (USD Million)
Table 11. Revenue Market Share of Key Antioxidants for Biodegradable Plastic Players in 2025
Table 12. World Antioxidants for Biodegradable Plastic Industry Rank of Major Player, Based on Revenue in 2025
Table 13. Global Antioxidants for Biodegradable Plastic Company Evaluation Quadrant
Table 14. Head Office of Key Antioxidants for Biodegradable Plastic Players
Table 15. Antioxidants for Biodegradable Plastic Market: Company Product Type Footprint
Table 16. Antioxidants for Biodegradable Plastic Market: Company Product Application Footprint
Table 17. Antioxidants for Biodegradable Plastic Mergers & Acquisitions Activity
Table 18. United States VS China Antioxidants for Biodegradable Plastic Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 19. United States VS China Antioxidants for Biodegradable Plastic Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 20. United States Based Antioxidants for Biodegradable Plastic Companies,

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Headquarters (States, Country)
Table 21. United States Based Companies Antioxidants for Biodegradable Plastic Revenue, (2021-2026) & (USD Million)
Table 22. United States Based Companies Antioxidants for Biodegradable Plastic Revenue Market Share (2021-2026)
Table 23. China Based Antioxidants for Biodegradable Plastic Companies, Headquarters (Province, Country)
Table 24. China Based Companies Antioxidants for Biodegradable Plastic Revenue, (2021-2026) & (USD Million)
Table 25. China Based Companies Antioxidants for Biodegradable Plastic Revenue Market Share (2021-2026)
Table 26. Rest of World Based Antioxidants for Biodegradable Plastic Companies, Headquarters (Province, Country)
Table 27. Rest of World Based Companies Antioxidants for Biodegradable Plastic Revenue (2021-2026) & (USD Million)
Table 28. Rest of World Based Companies Antioxidants for Biodegradable Plastic Revenue Market Share (2021-2026)
Table 29. World Antioxidants for Biodegradable Plastic Market Size by Active Antioxidant Content Types, (USD Million), 2021 & 2025 & 2032
Table 30. World Antioxidants for Biodegradable Plastic Market Size Value by Active Antioxidant Content Types (2021-2026) & (USD Million)
Table 31. World Antioxidants for Biodegradable Plastic Market Size by Active Antioxidant Content Types (2027-2032) & (USD Million)
Table 32. World Antioxidants for Biodegradable Plastic Market Size by Feedstock Origin Types, (USD Million), 2021 & 2025 & 2032
Table 33. World Antioxidants for Biodegradable Plastic Market Size Value by Feedstock Origin Types (2021-2026) & (USD Million)
Table 34. World Antioxidants for Biodegradable Plastic Market Size by Feedstock Origin Types (2027-2032) & (USD Million)
Table 35. World Antioxidants for Biodegradable Plastic Market Size by Antioxidant Mechanism Types, (USD Million), 2021 & 2025 & 2032
Table 36. World Antioxidants for Biodegradable Plastic Market Size Value by Antioxidant Mechanism Types (2021-2026) & (USD Million)
Table 37. World Antioxidants for Biodegradable Plastic Market Size by Antioxidant Mechanism Types (2027-2032) & (USD Million)
Table 38. World Antioxidants for Biodegradable Plastic Market Size by Application, (USD Million), 2021 & 2025 & 2032
Table 39. World Antioxidants for Biodegradable Plastic Market Size by Application (2021-2026) & (USD Million)

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Table 40. World Antioxidants for Biodegradable Plastic Market Size by Application (2027-2032) & (USD Million)
Table 41. BASF SE Basic Information, Manufacturing Base and Competitors
Table 42. BASF SE Major Business
Table 43. BASF SE Antioxidants for Biodegradable Plastic Product and Services
Table 44. BASF SE Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. BASF SE Recent Developments/Updates
Table 46. BASF SE Competitive Strengths & Weaknesses
Table 47. SONGWON Industrial Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 48. SONGWON Industrial Co., Ltd. Major Business
Table 49. SONGWON Industrial Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
Table 50. SONGWON Industrial Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. SONGWON Industrial Co., Ltd. Recent Developments/Updates
Table 52. SONGWON Industrial Co., Ltd. Competitive Strengths & Weaknesses
Table 53. ADEKA CORPORATION Basic Information, Manufacturing Base and Competitors
Table 54. ADEKA CORPORATION Major Business
Table 55. ADEKA CORPORATION Antioxidants for Biodegradable Plastic Product and Services
Table 56. ADEKA CORPORATION Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. ADEKA CORPORATION Recent Developments/Updates
Table 58. ADEKA CORPORATION Competitive Strengths & Weaknesses
Table 59. SI Group, Inc. Basic Information, Manufacturing Base and Competitors
Table 60. SI Group, Inc. Major Business
Table 61. SI Group, Inc. Antioxidants for Biodegradable Plastic Product and Services
Table 62. SI Group, Inc. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. SI Group, Inc. Recent Developments/Updates
Table 64. SI Group, Inc. Competitive Strengths & Weaknesses
Table 65. Tianjin Rianlon New Material Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 66. Tianjin Rianlon New Material Co., Ltd. Major Business
Table 67. Tianjin Rianlon New Material Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services

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Table 68. Tianjin Rianlon New Material Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Tianjin Rianlon New Material Co., Ltd. Recent Developments/Updates
Table 70. Tianjin Rianlon New Material Co., Ltd. Competitive Strengths & Weaknesses
Table 71. Dover Chemical Corporation Basic Information, Manufacturing Base and Competitors
Table 72. Dover Chemical Corporation Major Business
Table 73. Dover Chemical Corporation Antioxidants for Biodegradable Plastic Product and Services
Table 74. Dover Chemical Corporation Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 75. Dover Chemical Corporation Recent Developments/Updates
Table 76. Dover Chemical Corporation Competitive Strengths & Weaknesses
Table 77. Clariant International Ltd Basic Information, Manufacturing Base and Competitors
Table 78. Clariant International Ltd Major Business
Table 79. Clariant International Ltd Antioxidants for Biodegradable Plastic Product and Services
Table 80. Clariant International Ltd Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Clariant International Ltd Recent Developments/Updates
Table 82. Clariant International Ltd Competitive Strengths & Weaknesses
Table 83. Everspring Chemical Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 84. Everspring Chemical Co., Ltd. Major Business
Table 85. Everspring Chemical Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
Table 86. Everspring Chemical Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Everspring Chemical Co., Ltd. Recent Developments/Updates
Table 88. Everspring Chemical Co., Ltd. Competitive Strengths & Weaknesses
Table 89. Chitec Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 90. Chitec Technology Co., Ltd. Major Business
Table 91. Chitec Technology Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
Table 92. Chitec Technology Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Chitec Technology Co., Ltd. Recent Developments/Updates

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Table 94. Chitec Technology Co., Ltd. Competitive Strengths & Weaknesses
Table 95. Double Bond Chemical Ind. Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 96. Double Bond Chemical Ind. Co., Ltd. Major Business
Table 97. Double Bond Chemical Ind. Co., Ltd. Antioxidants for Biodegradable Plastic Product and Services
Table 98. Double Bond Chemical Ind. Co., Ltd. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Double Bond Chemical Ind. Co., Ltd. Recent Developments/Updates
Table 100. Double Bond Chemical Ind. Co., Ltd. Competitive Strengths & Weaknesses
Table 101. Sumitomo Chemical Company, Limited Basic Information, Manufacturing Base and Competitors
Table 102. Sumitomo Chemical Company, Limited Major Business
Table 103. Sumitomo Chemical Company, Limited Antioxidants for Biodegradable Plastic Product and Services
Table 104. Sumitomo Chemical Company, Limited Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. Sumitomo Chemical Company, Limited Recent Developments/Updates
Table 106. Sumitomo Chemical Company, Limited Competitive Strengths & Weaknesses
Table 107. 3V Sigma S.p.A. Basic Information, Manufacturing Base and Competitors
Table 108. 3V Sigma S.p.A. Major Business
Table 109. 3V Sigma S.p.A. Antioxidants for Biodegradable Plastic Product and Services
Table 110. 3V Sigma S.p.A. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 111. 3V Sigma S.p.A. Recent Developments/Updates
Table 112. 3V Sigma S.p.A. Competitive Strengths & Weaknesses
Table 113. JIYI CHEMICAL GROUP Basic Information, Manufacturing Base and Competitors
Table 114. JIYI CHEMICAL GROUP Major Business
Table 115. JIYI CHEMICAL GROUP Antioxidants for Biodegradable Plastic Product and Services
Table 116. JIYI CHEMICAL GROUP Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 117. JIYI CHEMICAL GROUP Recent Developments/Updates
Table 118. JIYI CHEMICAL GROUP Competitive Strengths & Weaknesses
Table 119. Oxiris Chemicals S.A. Basic Information, Manufacturing Base and Competitors

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Table 120. Oxiris Chemicals S.A. Major Business
Table 121. Oxiris Chemicals S.A. Antioxidants for Biodegradable Plastic Product and Services
Table 122. Oxiris Chemicals S.A. Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 123. Oxiris Chemicals S.A. Recent Developments/Updates
Table 124. Oxiris Chemicals S.A. Competitive Strengths & Weaknesses
Table 125. Beijing Tiangang Auxiliary Co., Ltd Basic Information, Manufacturing Base and Competitors
Table 126. Beijing Tiangang Auxiliary Co., Ltd Major Business
Table 127. Beijing Tiangang Auxiliary Co., Ltd Antioxidants for Biodegradable Plastic Product and Services
Table 128. Beijing Tiangang Auxiliary Co., Ltd Antioxidants for Biodegradable Plastic Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 129. Beijing Tiangang Auxiliary Co., Ltd Recent Developments/Updates
Table 130. Beijing Tiangang Auxiliary Co., Ltd Competitive Strengths & Weaknesses
Table 131. Global Key Players of Antioxidants for Biodegradable Plastic Upstream (Raw Materials)
Table 132. Global Antioxidants for Biodegradable Plastic Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Antioxidants for Biodegradable Plastic Picture
Figure 2. World Antioxidants for Biodegradable Plastic Total Revenue: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Antioxidants for Biodegradable Plastic Total Revenue (2021-2032) & (USD Million)
Figure 4. World Antioxidants for Biodegradable Plastic Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)
Figure 5. World Antioxidants for Biodegradable Plastic Revenue Market Share by Region (2021-2032), (by Headquarter Location)
Figure 6. United States Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 7. China Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 8. Europe Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 9. Japan Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 10. South Korea Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 11. ASEAN Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 12. India Based Company Antioxidants for Biodegradable Plastic Revenue (2021-2032) & (USD Million)
Figure 13. Antioxidants for Biodegradable Plastic Market Drivers
Figure 14. Factors Affecting Demand
Figure 15. World Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 16. World Antioxidants for Biodegradable Plastic Consumption Value Market Share by Region (2021-2032)
Figure 17. United States Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 18. China Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 19. Europe Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)

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Figure 20. Japan Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 21. South Korea Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 22. ASEAN Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 23. India Antioxidants for Biodegradable Plastic Consumption Value (2021-2032) & (USD Million)
Figure 24. Producer Shipments of Antioxidants for Biodegradable Plastic by Player Revenue ($MM) and Market Share (%): 2025
Figure 25. Global Four-firm Concentration Ratios (CR4) for Antioxidants for Biodegradable Plastic Markets in 2025
Figure 26. Global Four-firm Concentration Ratios (CR8) for Antioxidants for Biodegradable Plastic Markets in 2025
Figure 27. United States VS China: Antioxidants for Biodegradable Plastic Revenue Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Antioxidants for Biodegradable Plastic Consumption Value Market Share Comparison (2021 & 2025 & 2032)
Figure 29. World Antioxidants for Biodegradable Plastic Market Size by Active Antioxidant Content Types, (USD Million), 2021 & 2025 & 2032
Figure 30. World Antioxidants for Biodegradable Plastic Market Size Market Share by Active Antioxidant Content Types in 2025
Figure 31. Formulated Grade (<95%)
Figure 32. High-Content Grade (95–<99%)
Figure 33. High-Purity Grade (?99%)
Figure 34. World Antioxidants for Biodegradable Plastic Market Size Market Share by Active Antioxidant Content Types (2021-2032)
Figure 35. World Antioxidants for Biodegradable Plastic Market Size by Feedstock Origin Types, (USD Million), 2021 & 2025 & 2032
Figure 36. World Antioxidants for Biodegradable Plastic Market Size Market Share by Feedstock Origin Types in 2025
Figure 37. Synthetic Antioxidants
Figure 38. Bio-Based and Natural-Derived Antioxidants
Figure 39. World Antioxidants for Biodegradable Plastic Market Size Market Share by Feedstock Origin Types (2021-2032)
Figure 40. World Antioxidants for Biodegradable Plastic Market Size by Antioxidant Mechanism Types, (USD Million), 2021 & 2025 & 2032
Figure 41. World Antioxidants for Biodegradable Plastic Market Size Market Share by Antioxidant Mechanism Types in 2025

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Figure 42. Primary Antioxidants
Figure 43. Secondary Antioxidants
Figure 44. Multifunctional Antioxidants
Figure 45. World Antioxidants for Biodegradable Plastic Market Size Market Share by Antioxidant Mechanism Types (2021-2032)
Figure 46. World Antioxidants for Biodegradable Plastic Market Size by Application, (USD Million), 2021 & 2025 & 2032
Figure 47. World Antioxidants for Biodegradable Plastic Market Size Market Share by Application in 2025
Figure 48. Flexible Packaging and Compostable Bags
Figure 49. Agricultural Mulch Films and Horticultural Products
Figure 50. Rigid Packaging and Foodservice Articles
Figure 51. Biodegradable Fibers and Nonwovens
Figure 52. Consumer Goods and 3D Printing Materials
Figure 53. Others
Figure 54. World Antioxidants for Biodegradable Plastic Market Size Market Share by Application (2021-2032)
Figure 55. Antioxidants for Biodegradable Plastic Industrial Chain
Figure 56. Methodology
Figure 57. Research Process and Data Source

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