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Global Bio-based EPDM Rubber Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bio-based EPDM Rubber market size is expected to reach $ 280 million by 2032, rising at a market growth of 7.6% CAGR during the forecast period (2026-2032).

In 2025, global production of bio-based EPDM rubber was approximately 24,000 metric tons, with an average global market price of around $6,800 per metric ton. That year, total global production capacity for bio-based EPDM rubber reached 40,000 metric tons, and the industry's average gross profit margin stood at 30%. Bio-based EPDM (Ethylene Propylene Diene Monomer) rubber refers to EPDM materials produced by substituting traditional petroleum-based feedstocks with partially renewable biomass-derived raw materials. Conventional EPDM is primarily produced through the copolymerization of ethylene, propylene, and a small amount of non-conjugated diene monomers (such as ENB and DCPD); it is characterized by excellent resistance to ozone, weather, heat, and chemical corrosion, as well as superior electrical insulation properties. Bio-based EPDM does not fundamentally alter the polymer structure; instead, it incorporates bio-based ethylene, propylene, monomers, or biomass-derived auxiliary materials to reduce fossil resource consumption and carbon emissions across the product's lifecycle. Current primary technical pathways include producing bio-based ethylene from sources like sugarcane or bio-ethanol—which is then converted into EPDM polymerization feedstocks—and substituting certain petrochemical components with bio-based diene monomers. Bio-based EPDM finds major applications in automotive sealing systems, construction waterproofing materials, wire and cable sheathing, industrial rubber products, new energy vehicle components, and green manufacturing. Driven by the automotive industry's shift toward low-carbon operations, the green transformation of the tire and rubber sectors, and rising ESG supply chain requirements from international enterprises, bio-based EPDM has emerged as a key area of ??development for high-performance elastomers.

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The upstream segment of the bio-based EPDM value chain encompasses the supply of biomass raw materials, bio-ethanol production, the preparation of bio-based ethylene/propylene, and the supply of functional additives. Key raw material sources include biomass resources such as sugarcane, corn, and wheat; bio-ethanol is produced via fermentation and subsequently converted into bio-based ethylene through dehydration. Additionally, future production pathways may incorporate bio-based propylene, bio-based diene monomers, and vegetable oil-based modifiers. Core upstream technologies focus on biomass conversion efficiency, bio-based monomer purification, carbon footprint control, and the ability to ensure a stable supply of raw materials. As EPDM is a high-volume, high-performance synthetic rubber requiring a continuous and stable monomer supply, the capacity for large-scale bio-based feedstock provision directly impacts production costs and the pace of commercialization. The industry is currently driving the EPDM sector toward a low-carbon future by expanding bio-ethanol production capacity, optimizing bio-based monomer manufacturing processes, and establishing traceable, green supply chains. The midstream segment of the industry chain primarily encompasses processes such as bio-based monomer polymerization, EPDM synthesis, formulation modification, compounding, and standardized material production. During production, bio-based ethylene, bio-based propylene, or monomers from other renewable sources undergo polymerization alongside traditional monomers—often via solution polymerization—to yield EPDM rubber with targeted performance characteristics. Depending on the substitution ratio of bio-based raw materials, products are categorized into partially bio-based EPDM and high-bio-based-content EPDM; currently, commercial offerings predominantly utilize the partial substitution route to balance performance, cost, and supply stability. Midstream enterprises must rigorously control parameters such as polymerization conditions, molecular weight distribution, ethylene and diene content, and vulcanization properties to ensure products meet the requirements of automotive, construction, and industrial applications. Downstream applications for bio-based EPDM largely overlap with those of traditional EPDM, focusing on sectors that demand superior weather resistance, heat resistance, and long-term stability. In the automotive industry, EPDM is widely used for door seals, window sealing systems, engine compartment hoses, battery pack seals, and components for new energy vehicle (NEV) thermal management systems. Driven by the rapid growth of NEVs and automakers' efforts to decarbonize supply chains, bio-based EPDM holds significant growth potential in the fields of lightweighting and green automotive materials. In the construction sector, bio-based EPDM is utilized in waterproofing membranes, roofing sealants, and vibration-damping components; market demand continues to rise, propelled by green building initiatives and energy-efficiency standards. Furthermore, bio-based EPDM presents

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opportunities to replace traditional rubber materials in applications such as wire and cable, rail transportation, industrial equipment seals, and consumer goods.

By incorporating bio-based ethylene, bio-based propylene, or monomers from other renewable sources, bio-based EPDM reduces fossil resource consumption and carbon emissions across the product lifecycle while maintaining the material's excellent weather, ozone, heat, and chemical resistance. In recent years, global automakers have continuously advanced green supply chain initiatives and imposed stricter sustainability requirements for component materials; this is particularly evident in the new energy vehicle sector, where demand is rising for high-performance elastomers used in battery pack seals, thermal management system components, and vehicle body sealing materials. As EPDM is a critical material in automotive sealing systems, the demand from vehicle manufacturers for low-carbon rubber materials is driving the transition of bio-based EPDM from R&D validation to commercial application.

As regions such as Europe, North America, China, and Japan advance carbon reduction targets, green manufacturing policies, and corporate ESG management systems, the rubber industry is accelerating its shift from traditional petrochemical-based materials to low-carbon alternatives. Beyond the automotive sector, bio-based EPDM finds applications in areas such as architectural waterproofing, wire and cable sheathing, rail transit, industrial seals, and consumer goods. Notably, the growth of green building, infrastructure upgrades, and rising energy-efficiency standards for industrial equipment have heightened interest in elastomers that offer both long-term durability and environmental friendliness.

The key challenges currently facing the industrialization of bio-based EPDM lie in the stable supply and cost control of bio-based ethylene, propylene, and diene monomers. Looking ahead, production costs are expected to gradually decline as technologies for producing ethylene from bio-ethanol mature, renewable feedstock systems improve, and production capacity for green monomers expands. Simultaneously, advancements in polymerization process optimization, molecular structure control, and formulation modification will enable products to enhance their heat, oil, and low-temperature resistance as well as processability, all while retaining the performance advantages of traditional EPDM. Industry competition will shift its focus from merely increasing the bio-based proportion to achieving a comprehensive balance among bio-based content, material performance, and cost-effectiveness.

Report Scope

Global Bio-based EPDM Rubber Supply, Demand and Key Producers, 2026-2032

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This report studies the global Bio-based EPDM Rubber production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Bio-based EPDM Rubber 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 Bio-based EPDM Rubber that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Bio-based EPDM Rubber total production and demand, 2021-2032, (Tons)

Global Bio-based EPDM Rubber total production value, 2021-2032, (USD Million)

Global Bio-based EPDM Rubber production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Bio-based EPDM Rubber consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Bio-based EPDM Rubber domestic production, consumption, key domestic manufacturers and share

Global Bio-based EPDM Rubber production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Bio-based EPDM Rubber production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Bio-based EPDM Rubber production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Bio-based EPDM Rubber market based on the following parameters - company overview, production, value, price, gross margin,

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product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Arlanxeo(Lanxess), Dow, Trelleborg, GEZOFLEX, 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 Bio-based EPDM Rubber market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, 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 Bio-based EPDM Rubber Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Bio-based EPDM Rubber Market, Segmentation by Type:

Purity: 50%-60%

Purity: 60%-70%

Others

Global Bio-based EPDM Rubber Market, Segmentation by Bio-based Raw Material Source:

Bio-based Ethylene EPDM

Bio-based Propylene EPDM

Bio-based Diene EPDM

Global Bio-based EPDM Rubber Market, Segmentation by Production Route:

Bio-monomer Replacement EPDM

Biomass Conversion EPDM

Circular Bio-based EPDM

Global Bio-based EPDM Rubber Market, Segmentation by Performance Grade:

General-purpose Bio-based EPDM

High Heat-resistant Bio-based EPDM

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High Weather-resistant Bio-based EPDM

High/Low Temperature Resistant Bio-based EPDM

Global Bio-based EPDM Rubber Market, Segmentation by Application:

Automotive

Aerospace

Building and Construction

Others

Companies Profiled:

Arlanxeo(Lanxess)

Dow

Trelleborg

GEZOFLEX

Key Questions Answered

1. How big is the global Bio-based EPDM Rubber market?
2. What is the demand of the global Bio-based EPDM Rubber market?
3. What is the year over year growth of the global Bio-based EPDM Rubber market?
4. What is the total value of the global Bio-based EPDM Rubber market?
5. Who are the Major Players in the global Bio-based EPDM Rubber market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

1.1 Bio-based EPDM Rubber Introduction
1.2 World Bio-based EPDM Rubber Supply & Forecast
  1.2.1 World Bio-based EPDM Rubber Production Value (2021 & 2025 & 2032)
  1.2.2 World Bio-based EPDM Rubber Production (2021-2032)
  1.2.3 World Bio-based EPDM Rubber Pricing Trends (2021-2032)
1.3 World Bio-based EPDM Rubber Production by Region (Based on Production Site)
  1.3.1 World Bio-based EPDM Rubber Production Value by Region (2021-2032)
  1.3.2 World Bio-based EPDM Rubber Production by Region (2021-2032)
  1.3.3 World Bio-based EPDM Rubber Average Price by Region (2021-2032)
  1.3.4 North America Bio-based EPDM Rubber Production (2021-2032)
  1.3.5 Europe Bio-based EPDM Rubber Production (2021-2032)
  1.3.6 China Bio-based EPDM Rubber Production (2021-2032)
  1.3.7 Japan Bio-based EPDM Rubber Production (2021-2032)
1.4 Market Drivers, Restraints and Trends
  1.4.1 Bio-based EPDM Rubber Market Drivers
  1.4.2 Factors Affecting Demand
  1.4.3 Bio-based EPDM Rubber Major Market Trends

2 DEMAND SUMMARY

2.1 World Bio-based EPDM Rubber Demand (2021-2032)
2.2 World Bio-based EPDM Rubber Consumption by Region
  2.2.1 World Bio-based EPDM Rubber Consumption by Region (2021-2026)
  2.2.2 World Bio-based EPDM Rubber Consumption Forecast by Region (2027-2032)
2.3 United States Bio-based EPDM Rubber Consumption (2021-2032)
2.4 China Bio-based EPDM Rubber Consumption (2021-2032)
2.5 Europe Bio-based EPDM Rubber Consumption (2021-2032)
2.6 Japan Bio-based EPDM Rubber Consumption (2021-2032)
2.7 South Korea Bio-based EPDM Rubber Consumption (2021-2032)
2.8 ASEAN Bio-based EPDM Rubber Consumption (2021-2032)
2.9 India Bio-based EPDM Rubber Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Bio-based EPDM Rubber Production Value by Manufacturer (2021-2026)

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3.2 World Bio-based EPDM Rubber Production by Manufacturer (2021-2026)
3.3 World Bio-based EPDM Rubber Average Price by Manufacturer (2021-2026)
3.4 Bio-based EPDM Rubber Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Bio-based EPDM Rubber Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Bio-based EPDM Rubber in 2025
  3.5.3 Global Concentration Ratios (CR8) for Bio-based EPDM Rubber in 2025
3.6 Bio-based EPDM Rubber Market: Overall Company Footprint Analysis
  3.6.1 Bio-based EPDM Rubber Market: Region Footprint
  3.6.2 Bio-based EPDM Rubber Market: Company Product Type Footprint
  3.6.3 Bio-based EPDM Rubber Market: Company Product Application Footprint
3.7 Competitive Environment
  3.7.1 Historical Structure of the Industry
  3.7.2 Barriers of Market Entry
  3.7.3 Factors of Competition
3.8 New Entrant and Capacity Expansion Plans
3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Bio-based EPDM Rubber Production Value Comparison
  4.1.1 United States VS China: Bio-based EPDM Rubber Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Bio-based EPDM Rubber Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Bio-based EPDM Rubber Production Comparison
  4.2.1 United States VS China: Bio-based EPDM Rubber Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Bio-based EPDM Rubber Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Bio-based EPDM Rubber Consumption Comparison
  4.3.1 United States VS China: Bio-based EPDM Rubber Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Bio-based EPDM Rubber Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Bio-based EPDM Rubber Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Bio-based EPDM Rubber Manufacturers, Headquarters and Production Site (States, Country)

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4.4.2 United States Based Manufacturers Bio-based EPDM Rubber Production Value (2021-2026)
4.4.3 United States Based Manufacturers Bio-based EPDM Rubber Production (2021-2026)
4.5 China Based Bio-based EPDM Rubber Manufacturers and Market Share
4.5.1 China Based Bio-based EPDM Rubber Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Bio-based EPDM Rubber Production Value (2021-2026)
4.5.3 China Based Manufacturers Bio-based EPDM Rubber Production (2021-2026)
4.6 Rest of World Based Bio-based EPDM Rubber Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Bio-based EPDM Rubber Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Bio-based EPDM Rubber Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Bio-based EPDM Rubber Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Bio-based EPDM Rubber Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Purity: 50%-60%
5.2.2 Purity: 60%-70%
5.2.3 Others
5.3 Market Segment by Type
5.3.1 World Bio-based EPDM Rubber Production by Type (2021-2032)
5.3.2 World Bio-based EPDM Rubber Production Value by Type (2021-2032)
5.3.3 World Bio-based EPDM Rubber Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY BIO-BASED RAW MATERIAL SOURCE

6.1 World Bio-based EPDM Rubber Market Size Overview by Bio-based Raw Material Source: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Bio-based Raw Material Source
6.2.1 Bio-based Ethylene EPDM
6.2.2 Bio-based Propylene EPDM

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info@marketpublishers.com

6.2.3 Bio-based Diene EPDM
6.3 Market Segment by Bio-based Raw Material Source
6.3.1 World Bio-based EPDM Rubber Production by Bio-based Raw Material Source (2021-2032)
6.3.2 World Bio-based EPDM Rubber Production Value by Bio-based Raw Material Source (2021-2032)
6.3.3 World Bio-based EPDM Rubber Average Price by Bio-based Raw Material Source (2021-2032)

7 MARKET ANALYSIS BY PRODUCTION ROUTE

7.1 World Bio-based EPDM Rubber Market Size Overview by Production Route: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Production Route
7.2.1 Bio-monomer Replacement EPDM
7.2.2 Biomass Conversion EPDM
7.2.3 Circular Bio-based EPDM
7.3 Market Segment by Production Route
7.3.1 World Bio-based EPDM Rubber Production by Production Route (2021-2032)
7.3.2 World Bio-based EPDM Rubber Production Value by Production Route (2021-2032)
7.3.3 World Bio-based EPDM Rubber Average Price by Production Route (2021-2032)

8 MARKET ANALYSIS BY PERFORMANCE GRADE

8.1 World Bio-based EPDM Rubber Market Size Overview by Performance Grade: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Performance Grade
8.2.1 General-purpose Bio-based EPDM
8.2.2 High Heat-resistant Bio-based EPDM
8.2.3 High Weather-resistant Bio-based EPDM
8.2.4 High/Low Temperature Resistant Bio-based EPDM
8.3 Market Segment by Performance Grade
8.3.1 World Bio-based EPDM Rubber Production by Performance Grade (2021-2032)
8.3.2 World Bio-based EPDM Rubber Production Value by Performance Grade (2021-2032)
8.3.3 World Bio-based EPDM Rubber Average Price by Performance Grade (2021-2032)

+357 96 030922
info@marketpublishers.com

9 MARKET ANALYSIS BY APPLICATION

9.1 World Bio-based EPDM Rubber Market Size Overview by Application: 2021 VS 2025 VS 2032
9.2 Segment Introduction by Application
  9.2.1 Automotive
  9.2.2 Aerospace
  9.2.3 Building and Construction
  9.2.4 Others
9.3 Market Segment by Application
  9.3.1 World Bio-based EPDM Rubber Production by Application (2021-2032)
  9.3.2 World Bio-based EPDM Rubber Production Value by Application (2021-2032)
  9.3.3 World Bio-based EPDM Rubber Average Price by Application (2021-2032)

10 COMPANY PROFILES

10.1 Arlanxeo(Lanxess)
  10.1.1 Arlanxeo(Lanxess) Details
  10.1.2 Arlanxeo(Lanxess) Major Business
  10.1.3 Arlanxeo(Lanxess) Bio-based EPDM Rubber Product and Services
  10.1.4 Arlanxeo(Lanxess) Bio-based EPDM Rubber Production, Price, Value, Gross Margin and Market Share (2021-2026)
  10.1.5 Arlanxeo(Lanxess) Recent Developments/Updates
  10.1.6 Arlanxeo(Lanxess) Competitive Strengths & Weaknesses
10.2 Dow
  10.2.1 Dow Details
  10.2.2 Dow Major Business
  10.2.3 Dow Bio-based EPDM Rubber Product and Services
  10.2.4 Dow Bio-based EPDM Rubber Production, Price, Value, Gross Margin and Market Share (2021-2026)
  10.2.5 Dow Recent Developments/Updates
  10.2.6 Dow Competitive Strengths & Weaknesses
10.3 Trelleborg
  10.3.1 Trelleborg Details
  10.3.2 Trelleborg Major Business
  10.3.3 Trelleborg Bio-based EPDM Rubber Product and Services
  10.3.4 Trelleborg Bio-based EPDM Rubber Production, Price, Value, Gross Margin and Market Share (2021-2026)
  10.3.5 Trelleborg Recent Developments/Updates

+357 96 030922
info@marketpublishers.com

10.3.6 Trelleborg Competitive Strengths & Weaknesses
10.4 GEZOFLEX
10.4.1 GEZOFLEX Details
10.4.2 GEZOFLEX Major Business
10.4.3 GEZOFLEX Bio-based EPDM Rubber Product and Services
10.4.4 GEZOFLEX Bio-based EPDM Rubber Production, Price, Value, Gross Margin and Market Share (2021-2026)
10.4.5 GEZOFLEX Recent Developments/Updates
10.4.6 GEZOFLEX Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Bio-based EPDM Rubber Industry Chain
11.2 Bio-based EPDM Rubber Upstream Analysis
11.2.1 Bio-based EPDM Rubber Core Raw Materials
11.2.2 Main Manufacturers of Bio-based EPDM Rubber Core Raw Materials
11.3 Midstream Analysis
11.4 Downstream Analysis
11.5 Bio-based EPDM Rubber Production Mode
11.6 Bio-based EPDM Rubber Procurement Model
11.7 Bio-based EPDM Rubber Industry Sales Model and Sales Channels
11.7.1 Bio-based EPDM Rubber Sales Model
11.7.2 Bio-based EPDM Rubber Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology
13.2 Research Process and Data Source
13.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. World Bio-based EPDM Rubber Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Bio-based EPDM Rubber Production Value by Region (2021-2026) & (USD Million)
Table 3. World Bio-based EPDM Rubber Production Value by Region (2027-2032) & (USD Million)
Table 4. World Bio-based EPDM Rubber Production Value Market Share by Region (2021-2026)
Table 5. World Bio-based EPDM Rubber Production Value Market Share by Region (2027-2032)
Table 6. World Bio-based EPDM Rubber Production by Region (2021-2026) & (Tons)
Table 7. World Bio-based EPDM Rubber Production by Region (2027-2032) & (Tons)
Table 8. World Bio-based EPDM Rubber Production Market Share by Region (2021-2026)
Table 9. World Bio-based EPDM Rubber Production Market Share by Region (2027-2032)
Table 10. World Bio-based EPDM Rubber Average Price by Region (2021-2026) & (US$/Ton)
Table 11. World Bio-based EPDM Rubber Average Price by Region (2027-2032) & (US$/Ton)
Table 12. Bio-based EPDM Rubber Major Market Trends
Table 13. World Bio-based EPDM Rubber Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
Table 14. World Bio-based EPDM Rubber Consumption by Region (2021-2026) & (Tons)
Table 15. World Bio-based EPDM Rubber Consumption Forecast by Region (2027-2032) & (Tons)
Table 16. World Bio-based EPDM Rubber Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Bio-based EPDM Rubber Producers in 2025
Table 18. World Bio-based EPDM Rubber Production by Manufacturer (2021-2026) & (Tons)
Table 19. Production Market Share of Key Bio-based EPDM Rubber Producers in 2025
Table 20. World Bio-based EPDM Rubber Average Price by Manufacturer (2021-2026)

+357 96 030922
info@marketpublishers.com

& (US$/Ton)
Table 21. Global Bio-based EPDM Rubber Company Evaluation Quadrant
Table 22. World Bio-based EPDM Rubber Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Bio-based EPDM Rubber Production Site of Key Manufacturer
Table 24. Bio-based EPDM Rubber Market: Company Product Type Footprint
Table 25. Bio-based EPDM Rubber Market: Company Product Application Footprint
Table 26. Bio-based EPDM Rubber Competitive Factors
Table 27. Bio-based EPDM Rubber New Entrant and Capacity Expansion Plans
Table 28. Bio-based EPDM Rubber Mergers & Acquisitions Activity
Table 29. United States VS China Bio-based EPDM Rubber Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Bio-based EPDM Rubber Production Comparison, (2021 & 2025 & 2032) & (Tons)
Table 31. United States VS China Bio-based EPDM Rubber Consumption Comparison, (2021 & 2025 & 2032) & (Tons)
Table 32. United States Based Bio-based EPDM Rubber Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Bio-based EPDM Rubber Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Bio-based EPDM Rubber Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Bio-based EPDM Rubber Production (2021-2026) & (Tons)
Table 36. United States Based Manufacturers Bio-based EPDM Rubber Production Market Share (2021-2026)
Table 37. China Based Bio-based EPDM Rubber Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Bio-based EPDM Rubber Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Bio-based EPDM Rubber Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Bio-based EPDM Rubber Production, (2021-2026) & (Tons)
Table 41. China Based Manufacturers Bio-based EPDM Rubber Production Market Share (2021-2026)
Table 42. Rest of World Based Bio-based EPDM Rubber Manufacturers, Headquarters and Production Site (State, Country)

+357 96 030922
info@marketpublishers.com

Table 43. Rest of World Based Manufacturers Bio-based EPDM Rubber Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Bio-based EPDM Rubber Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Bio-based EPDM Rubber Production, (2021-2026) & (Tons)
Table 46. Rest of World Based Manufacturers Bio-based EPDM Rubber Production Market Share (2021-2026)
Table 47. World Bio-based EPDM Rubber Production Value by Type, (USD Million), 2021 & 2025 & 2032
Table 48. World Bio-based EPDM Rubber Production by Type (2021-2026) & (Tons)
Table 49. World Bio-based EPDM Rubber Production by Type (2027-2032) & (Tons)
Table 50. World Bio-based EPDM Rubber Production Value by Type (2021-2026) & (USD Million)
Table 51. World Bio-based EPDM Rubber Production Value by Type (2027-2032) & (USD Million)
Table 52. World Bio-based EPDM Rubber Average Price by Type (2021-2026) & (US$/Ton)
Table 53. World Bio-based EPDM Rubber Average Price by Type (2027-2032) & (US$/Ton)
Table 54. World Bio-based EPDM Rubber Production Value by Bio-based Raw Material Source, (USD Million), 2021 & 2025 & 2032
Table 55. World Bio-based EPDM Rubber Production by Bio-based Raw Material Source (2021-2026) & (Tons)
Table 56. World Bio-based EPDM Rubber Production by Bio-based Raw Material Source (2027-2032) & (Tons)
Table 57. World Bio-based EPDM Rubber Production Value by Bio-based Raw Material Source (2021-2026) & (USD Million)
Table 58. World Bio-based EPDM Rubber Production Value by Bio-based Raw Material Source (2027-2032) & (USD Million)
Table 59. World Bio-based EPDM Rubber Average Price by Bio-based Raw Material Source (2021-2026) & (US$/Ton)
Table 60. World Bio-based EPDM Rubber Average Price by Bio-based Raw Material Source (2027-2032) & (US$/Ton)
Table 61. World Bio-based EPDM Rubber Production Value by Production Route, (USD Million), 2021 & 2025 & 2032
Table 62. World Bio-based EPDM Rubber Production by Production Route (2021-2026) & (Tons)
Table 63. World Bio-based EPDM Rubber Production by Production Route (2027-2032)

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& (Tons)
Table 64. World Bio-based EPDM Rubber Production Value by Production Route (2021-2026) & (USD Million)
Table 65. World Bio-based EPDM Rubber Production Value by Production Route (2027-2032) & (USD Million)
Table 66. World Bio-based EPDM Rubber Average Price by Production Route (2021-2026) & (US$/Ton)
Table 67. World Bio-based EPDM Rubber Average Price by Production Route (2027-2032) & (US$/Ton)
Table 68. World Bio-based EPDM Rubber Production Value by Performance Grade, (USD Million), 2021 & 2025 & 2032
Table 69. World Bio-based EPDM Rubber Production by Performance Grade (2021-2026) & (Tons)
Table 70. World Bio-based EPDM Rubber Production by Performance Grade (2027-2032) & (Tons)
Table 71. World Bio-based EPDM Rubber Production Value by Performance Grade (2021-2026) & (USD Million)
Table 72. World Bio-based EPDM Rubber Production Value by Performance Grade (2027-2032) & (USD Million)
Table 73. World Bio-based EPDM Rubber Average Price by Performance Grade (2021-2026) & (US$/Ton)
Table 74. World Bio-based EPDM Rubber Average Price by Performance Grade (2027-2032) & (US$/Ton)
Table 75. World Bio-based EPDM Rubber Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 76. World Bio-based EPDM Rubber Production by Application (2021-2026) & (Tons)
Table 77. World Bio-based EPDM Rubber Production by Application (2027-2032) & (Tons)
Table 78. World Bio-based EPDM Rubber Production Value by Application (2021-2026) & (USD Million)
Table 79. World Bio-based EPDM Rubber Production Value by Application (2027-2032) & (USD Million)
Table 80. World Bio-based EPDM Rubber Average Price by Application (2021-2026) & (US$/Ton)
Table 81. World Bio-based EPDM Rubber Average Price by Application (2027-2032) & (US$/Ton)
Table 82. Arlanxeo(Lanxess) Basic Information, Manufacturing Base and Competitors
Table 83. Arlanxeo(Lanxess) Major Business

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Table 84. Arlanxeo(Lanxess) Bio-based EPDM Rubber Product and Services
Table 85. Arlanxeo(Lanxess) Bio-based EPDM Rubber Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 86. Arlanxeo(Lanxess) Recent Developments/Updates
Table 87. Arlanxeo(Lanxess) Competitive Strengths & Weaknesses
Table 88. Dow Basic Information, Manufacturing Base and Competitors
Table 89. Dow Major Business
Table 90. Dow Bio-based EPDM Rubber Product and Services
Table 91. Dow Bio-based EPDM Rubber Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 92. Dow Recent Developments/Updates
Table 93. Dow Competitive Strengths & Weaknesses
Table 94. Trelleborg Basic Information, Manufacturing Base and Competitors
Table 95. Trelleborg Major Business
Table 96. Trelleborg Bio-based EPDM Rubber Product and Services
Table 97. Trelleborg Bio-based EPDM Rubber Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 98. Trelleborg Recent Developments/Updates
Table 99. Trelleborg Competitive Strengths & Weaknesses
Table 100. GEZOFLEX Basic Information, Manufacturing Base and Competitors
Table 101. GEZOFLEX Major Business
Table 102. GEZOFLEX Bio-based EPDM Rubber Product and Services
Table 103. GEZOFLEX Bio-based EPDM Rubber Production (Tons), Price (US$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 104. GEZOFLEX Recent Developments/Updates
Table 105. GEZOFLEX Competitive Strengths & Weaknesses
Table 106. Global Key Players of Bio-based EPDM Rubber Upstream (Raw Materials)
Table 107. Global Bio-based EPDM Rubber Typical Customers
Table 108. Bio-based EPDM Rubber Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Bio-based EPDM Rubber Picture
Figure 2. World Bio-based EPDM Rubber Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Bio-based EPDM Rubber Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Bio-based EPDM Rubber Production (2021-2032) & (Tons)
Figure 5. World Bio-based EPDM Rubber Average Price (2021-2032) & (US$/Ton)
Figure 6. World Bio-based EPDM Rubber Production Value Market Share by Region (2021-2032)
Figure 7. World Bio-based EPDM Rubber Production Market Share by Region (2021-2032)
Figure 8. North America Bio-based EPDM Rubber Production (2021-2032) & (Tons)
Figure 9. Europe Bio-based EPDM Rubber Production (2021-2032) & (Tons)
Figure 10. China Bio-based EPDM Rubber Production (2021-2032) & (Tons)
Figure 11. Japan Bio-based EPDM Rubber Production (2021-2032) & (Tons)
Figure 12. Bio-based EPDM Rubber Market Drivers
Figure 13. Factors Affecting Demand
Figure 14. World Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 15. World Bio-based EPDM Rubber Consumption Market Share by Region (2021-2032)
Figure 16. United States Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 17. China Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 18. Europe Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 19. Japan Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 20. South Korea Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 21. ASEAN Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 22. India Bio-based EPDM Rubber Consumption (2021-2032) & (Tons)
Figure 23. Producer Shipments of Bio-based EPDM Rubber by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 24. Global Four-firm Concentration Ratios (CR4) for Bio-based EPDM Rubber Markets in 2025
Figure 25. Global Four-firm Concentration Ratios (CR8) for Bio-based EPDM Rubber Markets in 2025
Figure 26. United States VS China: Bio-based EPDM Rubber Production Value Market Share Comparison (2021 & 2025 & 2032)

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Figure 27. United States VS China: Bio-based EPDM Rubber Production Market Share Comparison (2021 & 2025 & 2032)
Figure 28. United States VS China: Bio-based EPDM Rubber Consumption Market Share Comparison (2021 & 2025 & 2032)
Figure 29. United States Based Manufacturers Bio-based EPDM Rubber Production Market Share 2025
Figure 30. China Based Manufacturers Bio-based EPDM Rubber Production Market Share 2025
Figure 31. Rest of World Based Manufacturers Bio-based EPDM Rubber Production Market Share 2025
Figure 32. World Bio-based EPDM Rubber Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 33. World Bio-based EPDM Rubber Production Value Market Share by Type in 2025
Figure 34. Purity: 50%-60%
Figure 35. Purity: 60%-70%
Figure 36. Others
Figure 37. World Bio-based EPDM Rubber Production Market Share by Type (2021-2032)
Figure 38. World Bio-based EPDM Rubber Production Value Market Share by Type (2021-2032)
Figure 39. World Bio-based EPDM Rubber Average Price by Type (2021-2032) & (US$/Ton)
Figure 40. World Bio-based EPDM Rubber Production Value by Bio-based Raw Material Source, (USD Million), 2021 & 2025 & 2032
Figure 41. World Bio-based EPDM Rubber Production Value Market Share by Bio-based Raw Material Source in 2025
Figure 42. Bio-based Ethylene EPDM
Figure 43. Bio-based Propylene EPDM
Figure 44. Bio-based Diene EPDM
Figure 45. World Bio-based EPDM Rubber Production Market Share by Bio-based Raw Material Source (2021-2032)
Figure 46. World Bio-based EPDM Rubber Production Value Market Share by Bio-based Raw Material Source (2021-2032)
Figure 47. World Bio-based EPDM Rubber Average Price by Bio-based Raw Material Source (2021-2032) & (US$/Ton)
Figure 48. World Bio-based EPDM Rubber Production Value by Production Route, (USD Million), 2021 & 2025 & 2032
Figure 49. World Bio-based EPDM Rubber Production Value Market Share by

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Production Route in 2025
Figure 50. Bio-monomer Replacement EPDM
Figure 51. Biomass Conversion EPDM
Figure 52. Circular Bio-based EPDM
Figure 53. World Bio-based EPDM Rubber Production Market Share by Production Route (2021-2032)
Figure 54. World Bio-based EPDM Rubber Production Value Market Share by Production Route (2021-2032)
Figure 55. World Bio-based EPDM Rubber Average Price by Production Route (2021-2032) & (US$/Ton)
Figure 56. World Bio-based EPDM Rubber Production Value by Performance Grade, (USD Million), 2021 & 2025 & 2032
Figure 57. World Bio-based EPDM Rubber Production Value Market Share by Performance Grade in 2025
Figure 58. General-purpose Bio-based EPDM
Figure 59. High Heat-resistant Bio-based EPDM
Figure 60. High Weather-resistant Bio-based EPDM
Figure 61. High/Low Temperature Resistant Bio-based EPDM
Figure 62. World Bio-based EPDM Rubber Production Market Share by Performance Grade (2021-2032)
Figure 63. World Bio-based EPDM Rubber Production Value Market Share by Performance Grade (2021-2032)
Figure 64. World Bio-based EPDM Rubber Average Price by Performance Grade (2021-2032) & (US$/Ton)
Figure 65. World Bio-based EPDM Rubber Production Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 66. World Bio-based EPDM Rubber Production Value Market Share by Application in 2025
Figure 67. Automotive
Figure 68. Aerospace
Figure 69. Building and Construction
Figure 70. Others
Figure 71. World Bio-based EPDM Rubber Production Market Share by Application (2021-2032)
Figure 72. World Bio-based EPDM Rubber Production Value Market Share by Application (2021-2032)
Figure 73. World Bio-based EPDM Rubber Average Price by Application (2021-2032) & (US$/Ton)
Figure 74. Bio-based EPDM Rubber Industry Chain

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Figure 75. Bio-based EPDM Rubber Procurement Model
Figure 76. Bio-based EPDM Rubber Sales Model
Figure 77. Bio-based EPDM Rubber Sales Channels, Direct Sales, and Distribution
Figure 78. Methodology
Figure 79. Research Process and Data Source

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