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Global Bio-based Ethylene Glycol Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/GD981B7ACD13EN.html
Date: September 2026
Pages: 93
Price: US$ 4,480.00 (Single User License)
ID: GD981B7ACD13EN

Abstracts

The global Bio-based Ethylene Glycol market size is expected to reach $ 209 million by 2032, rising at a market growth of 25.4% CAGR during the forecast period (2026-2032).

Bio-based Ethylene Glycol is renewable monoethylene glycol produced from biological carbon sources such as sugar, starch hydrolysate, bioethanol, agricultural residues, or lignocellulosic biomass. It has the same fundamental molecular structure and downstream processing compatibility as fossil-based monoethylene glycol and can function as a drop-in raw material in established polymerization, formulation, and recycling systems. This study covers Bio-based Ethylene Glycol manufactured through the bioethylene oxide hydration route and the direct catalytic conversion of biomass-derived sugars, with feedstocks classified into first-generation sugar and starch resources and second-generation lignocellulosic resources. Product grades include industrial-grade material with purity from 99.0% to below 99.5%, polyester-grade material from 99.5% to below 99.9%, and high-purity material of at least 99.9%. Key quality parameters include purity, water content, color, ultraviolet transmittance, acidity, aldehyde content, renewable carbon content, and suitability for polymer-grade processing. Principal applications comprise PET resin and packaging, polyester fibers and textiles, automotive coolants and antifreeze, industrial heat-transfer and deicing fluids, and specialty resin, adhesive, and chemical-intermediate production.

Key Findings

Commercial supply remains concentrated among a small number of producers

India Glycols provides the longest-established commercial bioethanol-based

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production base

UPM is ramping industrial-scale lignocellulosic chemical production at Leuna

UPM acquired Avantium’s Ray Technology intellectual property in May 2026

PET packaging and polyester fibers form the principal downstream demand base

Market Trends

The Bio-based Ethylene Glycol industry is moving from a market dominated by first-generation bioethanol conversion toward a more diverse technology base incorporating direct sugar conversion and second-generation lignocellulosic feedstocks. Established production through bioethanol, bioethylene, and bioethylene oxide remains commercially important because it uses proven chemical-processing infrastructure and supplies material compatible with existing polyester production. Newer routes seek to shorten the conversion chain by catalytically transforming biomass-derived sugars into glycols, while lignocellulosic platforms aim to reduce dependence on food-related feedstocks and strengthen renewable-carbon traceability. Product development is increasingly focused on polyester-grade purity, color stability, ultraviolet transmittance, chain-of-custody certification, and direct substitution in existing production and recycling processes. The May 2026 transfer of Avantium’s Ray Technology intellectual property to UPM reflects a broader concentration of process knowledge around companies able to finance industrial scale-up. Market development is therefore shifting from technology demonstration toward feedstock integration, industrial reliability, customer qualification, and verifiable renewable-carbon performance.

Market Dynamics

Drivers

Demand for Bio-based Ethylene Glycol is driven by the need to reduce fossil-carbon content in PET packaging, polyester textiles, automotive fluids, and other established glycol applications without requiring major changes to downstream manufacturing assets. Because the product is chemically equivalent to conventional monoethylene glycol, qualified grades can be incorporated into existing polymerization, formulation,

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and recycling systems, lowering the technical barriers associated with adopting entirely new materials. Consumer brands and material producers are increasingly seeking renewable feedstocks with traceable supply chains and measurable carbon-reduction potential. PET bottle, food packaging, pharmaceutical packaging, textile, and automotive supply chains provide particularly relevant demand because ethylene glycol represents a significant fossil-derived component of their material structure. Expansion of commercial production capacity, improved access to induction-grade and polyester-grade products, and collaboration between glycol producers, resin manufacturers, and brand owners are strengthening the path from sample validation to recurring industrial demand.

Restraints

The principal constraints are production cost, limited commercial supply, feedstock logistics, process yield, purification requirements, and competition from large-scale fossil-based monoethylene glycol. Conventional producers benefit from mature plants, established logistics, and commodity-scale economics, while Bio-based Ethylene Glycol facilities must absorb the costs of renewable feedstock preparation, fermentation or sugar conversion, hydrogen, catalysts, separation, quality control, certification, and comparatively low utilization during ramp-up. Polyester and PET applications require tight control of purity, color, ultraviolet transmittance, aldehydes, water, and trace impurities, meaning that material suitable for general industrial fluids may not automatically qualify for polymer production. Bioethanol-based routes may also be exposed to agricultural feedstock and ethanol price movements, while lignocellulosic routes face more complex biomass fractionation and process-integration requirements. The price premium available for renewable carbon can vary by customer, region, and end market, creating uncertainty over the speed at which capacity can reach stable utilization and acceptable profitability.

Opportunities

The strongest market opportunities lie in scaling second-generation feedstocks, expanding polyester-grade output, and establishing long-term supply partnerships with PET, polyester, packaging, textile, and automotive-material producers. Lignocellulosic biomass offers a pathway to use wood and agricultural residues while reducing reliance on food-related sugar and starch resources. Direct conversion of biomass sugars can potentially simplify the process chain compared with the bioethanol-to-bioethylene oxide route, provided that catalyst performance, selectivity, hydrogen use, and purification

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economics are demonstrated at commercial scale. High-purity Bio-based Ethylene Glycol can support renewable PET, PETG, pharmaceutical packaging, specialty polyester, battery and engine coolants, and other applications where traceable renewable content creates differentiated value. Additional opportunities exist in mass-balance and segregated supply models, certified regional value chains, customer-specific life-cycle assessment, and technology licensing. New industrial projects in Europe, China, and North America could broaden the supplier base and reduce the current dependence on a limited number of production platforms.

Challenges

The central industry challenge is converting technically successful processes into continuously operating, cost-competitive plants capable of meeting polymer-grade specifications. Direct sugar and lignocellulosic routes must maintain high ethylene glycol selectivity while controlling coproduct formation, catalyst deactivation, biomass variability, hydrogen consumption, wastewater, and separation loads. Industrial customers require consistent product quality, reliable delivery, regulatory documentation, renewable-carbon verification, and evidence that the material will not disrupt polymerization, color, mechanical properties, packaging safety, or recycling performance. Qualification cycles can therefore extend well beyond initial sample production. Capital-intensive projects also face construction risk, commissioning delays, slower-than-planned ramp-up, and uncertainty over the renewable premium customers will accept. Technology ownership is becoming strategically important, as demonstrated by UPM’s acquisition of the Ray Technology portfolio, while companies unable to fund continued development may exit or transfer their intellectual property. Sustained market growth will depend on operational performance rather than announced capacity alone.

Industry Chain Analysis

The upstream chain begins with renewable carbon feedstocks such as molasses, sugarcane or corn-derived ethanol, glucose and starch hydrolysates, straw-derived sugars, and certified hardwood or other lignocellulosic biomass. Additional inputs include hydrogen, catalysts, process water, enzymes or biomass-fractionation chemicals, utilities, and certification and traceability systems. In the bioethylene oxide hydration route, bioethanol is converted into bioethylene, followed by oxidation to bioethylene oxide and hydration to Bio-based Ethylene Glycol. Direct biomass sugar conversion uses catalytic hydrogenation or hydrogenolysis to convert renewable sugars

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into ethylene glycol, with subsequent separation and purification. Lignocellulosic routes add pretreatment and fractionation steps to recover fermentable or catalytic-conversion sugars from cellulose and hemicellulose.

Midstream value creation is concentrated in conversion yield, catalyst selectivity, energy integration, purification efficiency, polyester-grade quality control, renewable-carbon certification, and stable plant operation. Downstream customers use Bio-based Ethylene Glycol in PET and PETG resins, polyester fibers, coolants, antifreeze, industrial heat-transfer liquids, deicing fluids, resins, adhesives, and chemical intermediates. Feedstock and utility costs, hydrogen consumption, catalyst life, separation intensity, plant utilization, and logistics are the main cost drivers. Producers can obtain additional value through second-generation feedstocks, lower-carbon production, regional supply chains, verified chain of custody, high-purity grades, customer qualification support, and long-term contracts with resin manufacturers and consumer brands.

Segment Insights

By production route, the bioethylene oxide hydration route represents the most established commercial structure, supported by India Glycols' long operating history using bioethanol to produce bioethylene glycols. The route benefits from familiar ethylene oxide and glycol chemistry, but its economics remain linked to bioethanol supply, multiple conversion stages, and energy requirements. Direct biomass sugar conversion forms the principal emerging route. SinoSci Bio-EG has operated a thousand-ton-scale straw-sugar-to-ethylene-glycol unit, produced polyester-grade material with purity reaching at least 99.9%, and advanced a ten-thousand-ton process package, while UPM is scaling a lignocellulosic biorefinery platform based on certified wood.

By purity, polyester-grade Bio-based Ethylene Glycol is the strategically most important segment because PET resin, PETG, and polyester fibers represent the principal volume applications and require tighter quality control than many industrial-fluid uses. High-purity material is relevant to demanding polymer, packaging, pharmaceutical, and specialty-chemical applications, while industrial-grade material can serve selected coolant, heat-transfer, deicing, resin, and intermediate uses. By feedstock generation, first-generation sugar, starch, and bioethanol feedstocks currently provide the more established production base. Second-generation lignocellulosic feedstocks represent the key technology and value-development direction because they broaden renewable

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raw-material availability and offer stronger differentiation in feedstock sustainability and carbon traceability.

Downstream Market Opportunities

PET resin and packaging represent the largest downstream opportunity for Bio-based Ethylene Glycol because the product can replace the glycol component of conventional PET while retaining compatibility with established resin production, conversion, and recycling systems. Beverage bottles, food containers, packaging films, pharmaceutical bottles, and PETG packaging provide opportunities for brands seeking renewable carbon without changing the fundamental polymer platform. Polyester fibers and textiles constitute another major demand area, particularly for apparel, home textiles, technical fibers, and footwear materials. Automotive coolants, antifreeze, battery thermal-management liquids, industrial heat-transfer fluids, and deicing formulations provide additional outlets where chemical equivalence and renewable content can support product differentiation. Specialty polyester resins, adhesives, composites, and chemical intermediates offer smaller but potentially higher-value applications. Commercial growth will depend on joint qualification between glycol producers, resin manufacturers, formulators, converters, and end brands rather than on spot-market availability alone.

Regional Insights

Asia currently anchors the established commercial supply and the largest underlying demand base for ethylene glycol. India Glycols provides the market’s longest-running bioethanol-based production platform, while China is developing direct biomass sugar conversion through SinoSci Bio-EG’s thousand-ton demonstration and small-batch commercialization activities. The region’s large polyester, textile, and PET manufacturing industries create a substantial potential customer base, although adoption remains sensitive to renewable premiums, product qualification, and reliable supply. Braskem and Sojitz identified Asia as the dominant global MEG consumption region when establishing Sustainea, reinforcing its strategic importance for future Bio-based Ethylene Glycol demand.

Europe is emerging as the principal center for new second-generation industrial capacity. UPM’s Leuna biorefinery is ramping a 220,000-ton-per-year multi-product biochemical platform based on certified hardwood, with renewable ethylene glycol positioned as one of its core products. UPM’s acquisition of Avantium’s Ray

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Technology intellectual property in May 2026 further consolidated European process capability. North America remains primarily a project-development market: Sustainea is advancing a planned Bio-based Ethylene Glycol facility in Lafayette, Indiana, using corn-derived dextrose, but current official communications continue to describe the facility as planned rather than operating.

Competitive Landscape Analysis

The Bio-based Ethylene Glycol market remains highly concentrated, with competitors differentiated by commercial maturity, feedstock route, scale, purity, intellectual property, and customer qualification. India Glycols is the established incumbent, with commercial bioethylene glycol production dating back to 1989 and an integrated bioethanol-based route covering MEG, DEG, and TEG. UPM is the most significant industrial-scale new entrant, positioning UPM BioPura as a wood-based, polyester-grade drop-in product while ramping the Leuna biorefinery; its May 2026 acquisition of Avantium's Ray Technology strengthened its biomass-to-glycols intellectual-property position. () represents China's principal direct-conversion commercialization platform, operating a thousand-ton-scale unit, supplying small batches of polyester-grade product, and advancing a ten-thousand-ton production line. Braskem has demonstrated sugar-based Bio-based Ethylene Glycol production, but the commercial business is being advanced through its joint venture with Sojitz, Sustainea, whose first planned industrial facility has not yet been officially confirmed as operating. Avantium exited independent Ray Technology development after selling the associated intellectual property to UPM. Competitive leadership will therefore be determined by actual plant ramp-up, consistent polyester-grade output, feedstock and carbon traceability, contracted customers, cost control, and the ability to convert announced projects into reliable commercial supply.

Report Scope

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

This report is a detailed and comprehensive analysis of the world market for Bio-based Ethylene Glycol 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 Ethylene Glycol that

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contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Bio-based Ethylene Glycol total production and demand, 2021-2032, (Tons)

Global Bio-based Ethylene Glycol total production value, 2021-2032, (USD Million)

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

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

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

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

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

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

This report profiles key players in the global Bio-based Ethylene Glycol market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include India Glycols Limited, UPM-Kymmene Corporation, SinoSci Bio-EG (Zhengzhou) New Energy Technology Co., Ltd., Dacheng Group, etc.

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

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Bio-based Ethylene Glycol 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 Ethylene Glycol Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Bio-based Ethylene Glycol Market, Segmentation by Type:

Bioethylene Oxide Hydration Route

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Direct Biomass Sugar Conversion Route

Global Bio-based Ethylene Glycol Market, Segmentation by Purity:

Industrial Grade (Purity: 99.0–<99.5%)

Polyester Grade (Purity: 99.5–<99.9%)

High-Purity Grade (Purity: ?99.9%)

Global Bio-based Ethylene Glycol Market, Segmentation by Renewable Feedstock Generation Types:

First-Generation Sugar and Starch Feedstock

Second-Generation Lignocellulosic Feedstock

Global Bio-based Ethylene Glycol Market, Segmentation by Application:

PET Resin and Packaging (Beverage Bottles, Food Containers, and Packaging Films)

Polyester Fibers and Textiles

Automotive Coolants and Antifreeze

Industrial Heat Transfer and Deicing Fluids

Others

Companies Profiled:

India Glycols Limited

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UPM-Kymmene Corporation

SinoSci Bio-EG (Zhengzhou) New Energy Technology Co., Ltd.

Dacheng Group

Key Questions Answered

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

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