

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

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Abstracts

The global Bio-based Film market size is expected to reach \$ 10346 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

Bio-based films are polymer films derived from renewable biomass sources including corn starch, sugarcane, cellulose, vegetable oils, and microorganisms. Unlike conventional petroleum-based plastic films, bio-based films are manufactured from annually renewable resources, significantly reducing carbon footprint and fossil fuel dependency. Common types include polylactic acid (PLA) films, bio-based polyethylene films, bio-based PET films, polyhydroxyalkanoate films, and starch-based films. Key properties vary by material: PLA offers high transparency and rigidity, bio-PET provides strength and heat resistance similar to conventional PET, and PHA offers marine biodegradability. These films are widely used in food packaging, agricultural mulch films, compostable bags, medical packaging, and electronics protective films. From a value chain perspective, upstream includes biomass feedstock suppliers, biorefinery processors, and monomer manufacturers; midstream involves polymerization, film extrusion, surface treatment, coating, slitting, and quality testing; downstream demand spans food packaging converters, agricultural supply companies, retail packaging users, healthcare providers, and industrial end-users. In 2025, the average selling price is approximately US\$2,650 per ton, global sales volume is about 2,219k tons, and gross margins generally range from 15% to 25%, driven by feedstock costs, production scale, energy prices, and regulatory compliance requirements.

The bio-based film market is experiencing significant growth driven by stringent global plastic regulations, rising consumer demand for sustainable packaging, and continuous innovation in biopolymer technologies .

Regulatory Push as Primary Growth Driver

Government regulations banning single-use plastics and promoting compostable alternatives have become the primary catalyst for bio-based film adoption . The European Union's Single-Use Plastics Directive, which bans certain plastic items and mandates recycled content, has accelerated the transition to bio-based alternatives . Similar regulations in North America and Asia-Pacific are expanding the addressable market. Governments worldwide are implementing stricter packaging waste regulations, carbon reduction targets, and green procurement policies that favor bio-based materials.

Food Packaging as the Largest Application Segment

The food packaging industry is the largest and fastest-growing consumer of bio-based films . These materials are increasingly used for fresh produce, bakery goods, dairy products, meat and poultry, and ready-to-eat meals . The demand for extended shelf life while maintaining product freshness drives innovation in barrier properties.

Compostable bags for organic waste collection represent another high-growth segment, aligned with municipal composting programs in Europe and North America . Agricultural mulch films made from bio-based and biodegradable materials are gaining traction as they can be plowed directly into soil after use, eliminating retrieval and disposal costs .

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

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

Highlights and key features of the study

Global Bio-based Film total production and demand, 2021-2032, (Kilotons)

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

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

Global Bio-based Film consumption by region & country, CAGR, 2021-2032 & (Kilotons)

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

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

Global Bio-based Film production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Bio-based Film production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Bio-based Film 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 Toray Industries, Inc., Mondi Group, Amcor plc, Taghleef Industries, Avery Dennison Corporation, Kuraray Co., Ltd., SKC Co., Ltd., BI-AX International Inc., Cortec Corporation, Polyplex Corporation 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 Bio-based Film market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Film Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Bio-based Film Market, Segmentation by Type:

Compostable Films

Non-compostable Films

Global Bio-based Film Market, Segmentation by Bio-based Carbon Content:

Low Bio-content (20-40%)

Medium Bio-content (40-70%)

High Bio-content (70-100%)

Global Bio-based Film Market, Segmentation by Thickness:

Thin Film (
Standard Film (25-100 μ m)

Heavy Gauge Film (> 100 μ m)

Global Bio-based Film Market, Segmentation by Application:

Food Packaging

Home & Personal Care

Medical & Pharmaceutical

Pet Food & Care

Other

Companies Profiled:

Toray Industries, Inc.

Mondi Group

Amcor plc

Taghleef Industries

Avery Dennison Corporation

Kuraray Co., Ltd.

SKC Co., Ltd.

BI-AX International Inc.

Cortec Corporation

Polyplex Corporation Ltd.

Uflex Ltd.

Aicello Corporation

Sekisui Chemical Co., Ltd.

Danimer Scientific, Inc.

NatureWorks LLC

TIPA Sustainable Packaging

Tbs-pack GmbH

BELCA S.A.

POLIFILM GmbH

Irplast S.p.A.

Fabbri Group

Cosmo Films Ltd.

BioMass Packaging

Green Dot Bioplastics

Kingfa Sci. & Tech. Co., Ltd.

Zhejiang Hisoar Biotech Co., Ltd.

COFCO Biochemical

Jiangsu Torise Biomaterials Co., Ltd.

Anhui Guofeng Wood Industry Co., Ltd.

Key Questions Answered:

1. How big is the global Bio-based Film market?
2. What is the demand of the global Bio-based Film market?
3. What is the year over year growth of the global Bio-based Film market?
4. What is the production and production value of the global Bio-based Film market?
5. Who are the key producers in the global Bio-based Film market?
6. What are the growth factors driving the market demand?

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