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Global Bio-based Isobutyric Acid Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

https://marketpublishers.com/r/GB3E6C299602EN.html
Date: September 2026
Pages: 83
Price: US$ 3,480.00 (Single User License)
ID: GB3E6C299602EN

Abstracts

According to our (Global Info Research) latest study, the global Bio-based Isobutyric Acid market size was valued at US$ 37.60 million in 2025 and is forecast to a readjusted size of US$ 73.58 million by 2032 with a CAGR of 10.4% during review period.

In 2025, global production of bio-based isobutyric acid stood at approximately 6,300 metric tons, with a global average market price of around $5,800 per metric ton. That year, total global production capacity reached 9,500 metric tons, and the industry's average gross profit margin hit 30%. Bio-based isobutyric acid refers to isobutyric acid products manufactured from renewable biomass resources using green processes such as microbial fermentation, biotransformation, or biocatalysis. Isobutyric acid is a branched-chain fatty acid with the molecular formula C?H?O?; it serves as a vital short-chain carboxylic acid and an intermediate in fine chemical production. Unlike traditional petroleum-based isobutyric acid—which relies primarily on the propylene carbonylation route—bio-based isobutyric acid is synthesized via the metabolic pathways of engineered microorganisms using renewable carbon sources such as glucose, starch-derived sugars, and sugarcane sugars. It offers advantages such as sustainable raw materials, lower carbon emissions, and alignment with green chemistry trends. Bio-based isobutyric acid finds applications in sectors including fragrances, coatings, solvents, plasticizers, pharmaceutical intermediates, bio-based polymers, and fuel additives. Notably, it can be further converted into high-value-added products such as isobutyrate esters, isobutanol, and methacrylate compounds. As the global chemical industry shifts toward low-carbon operations and biomanufacturing, and as corporate demand for sustainable raw materials and green supply chains grows, bio-based isobutyric acid is increasingly emerging as a significant alternative to traditional

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petrochemical-based isobutyric acid.

The upstream segment of the bio-based isobutyric acid value chain primarily encompasses the supply of renewable carbon sources, microbial strain development, fermentation auxiliary materials, and biomanufacturing equipment. Key raw materials include corn starch, sugarcane, cassava, wheat sugar syrup, and other sugar-containing biomass resources; these undergo saccharification to yield fermentation substrates like glucose, which serve as the carbon source for microbial synthesis. Currently, production relies on metabolically engineered microorganisms; by optimizing branched-chain amino acid metabolic pathways, these microorganisms convert sugars into isobutyric acid precursors, which are subsequently transformed into the target product. Core upstream technologies focus on constructing high-yield strains, regulating metabolic pathways, optimizing fermentation conditions, and enhancing raw material utilization efficiency. Because the production process involves challenges such as controlling by-products, increasing yields, and mitigating product inhibition, strain performance and fermentation technology are critical determinants of cost competitiveness. The midstream segment primarily covers the fermentation and manufacturing of bio-based isobutyric acid, as well as separation, extraction, refining, and product standardization. During production, microorganisms ferment carbohydrate-based feedstocks to convert carbon sources into isobutyric acid; high-purity isobutyric acid products are subsequently obtained through processes such as filtration, extraction, membrane separation, distillation, and rectification. Currently, bio-based isobutyric acid is in the stage of industrialization, with production scales smaller than those of traditional petrochemical-based routes; industry competition focuses on reducing production costs, enhancing fermentation conversion efficiency, optimizing separation processes, and establishing stable supply capabilities. Bio-based isobutyric acid has a wide range of downstream applications, with the fine chemical and fragrance industries serving as key sectors. Isobutyric acid is used to synthesize isobutyrate esters—such as ethyl isobutyrate and isobutyl isobutyrate—which are utilized in food flavorings, fragrances for daily-use chemicals, and seasoning agents. In the chemical industry, it serves as a vital raw material for producing isobutyrate esters, plasticizers, coating additives, solvents, and other organic intermediates. Furthermore, isobutyric acid can be further processed via biocatalytic and chemical conversion routes into isobutanol, methacrylic acid-related materials, and bio-based fuel components, demonstrating significant potential in the fields of green chemistry and sustainable materials. In the pharmaceutical sector, isobutyric acid and its derivatives are used in the synthesis of certain pharmaceutical intermediates.

The global chemical industry's low-carbon transition and the rising demand for

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sustainable raw materials are the core drivers behind the development of bio-based isobutyric acid. Produced via microbial fermentation or biotransformation using renewable biomass—such as glucose, starch-derived sugars, and sugarcane sugars—bio-based isobutyric acid offers advantages over traditional petrochemical routes, including reduced reliance on fossil resources, lower carbon emissions, and enhanced value within green supply chains. In recent years, regions such as Europe, the United States, China, and Japan have actively advanced carbon neutrality strategies, green manufacturing policies, and the adoption of sustainable chemicals, compelling chemical enterprises to seek alternatives to petroleum-based feedstocks. As a vital short-chain carboxylic acid and fine chemical intermediate, isobutyric acid enjoys steady demand in sectors ranging from fragrances and solvents to coating additives and high-performance chemicals; consequently, the bio-based production route has garnered increasing attention as a key direction for the green chemical industry.

Isobutyric acid serves as a precursor for the production of isobutyrate esters, isobutanol, methacrylic acid derivatives, and other functional chemicals, finding broad application in fragrances, coatings, adhesives, pharmaceutical intermediates, and specialty materials. Driven by consumer demand for natural fragrances, green solvents, and low-carbon materials, downstream enterprises are increasingly seeking chemical feedstocks with traceable bio-based origins. Furthermore, bio-based isobutyric acid holds potential as a platform molecule for future bio-based polymers and sustainable chemicals; as biomanufacturing technologies mature, its application scope is expected to expand from traditional fine chemicals into the realm of high-value-added materials.

Report Scope

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

Key Features:

Global Bio-based Isobutyric Acid market size and forecasts, in consumption value ($

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Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Bio-based Isobutyric Acid market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Bio-based Isobutyric Acid market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Tons), and average selling prices (US$/Ton), 2021-2032

Global Bio-based Isobutyric Acid market shares of main players, shipments in revenue ($ Million), sales quantity (Tons), and ASP (US$/Ton), 2021-2026

The Primary Objectives in This Report Are:

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

To assess the growth potential for Bio-based Isobutyric Acid

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

To assess competitive factors affecting the marketplace

This report profiles key players in the global Bio-based Isobutyric Acid market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Afyren, Lygos, etc.

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

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

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Market Segmentation

Market segment by Type

Purity: ?98%

Purity: >98%

Market segment by Raw Material Source

Food Crop-based Bio-Isobutyric Acid

Non-food Biomass-based Bio-Isobutyric Acid

Waste-derived Bio-Isobutyric Acid

Market segment by Purity Grade

Feed Grade

Food Grade

Pharmaceutical Grade

Market segment by Production Technology Route

Microbial Fermentation Method

Enzyme-catalyzed Method

Metabolic Engineering Modification Route

Market segment by Application

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Pharmaceutical

Cosmetics

Food Additives

Plasticizer

Others

Major players covered

Afyren

Lygos

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

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

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

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

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

Chapter Outline

Chapter 1, to describe Bio-based Isobutyric Acid product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Bio-based Isobutyric Acid, with price,

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sales quantity, revenue, and global market share of Bio-based Isobutyric Acid from 2021 to 2026.

Chapter 3, the Bio-based Isobutyric Acid competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Bio-based Isobutyric Acid breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Bio-based Isobutyric Acid market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

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

Chapter 13, the key raw materials and key suppliers, and industry chain of Bio-based Isobutyric Acid.

Chapter 14 and 15, to describe Bio-based Isobutyric Acid sales channel, distributors, customers, research findings and conclusion.

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Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope
1.2 Market Estimation Caveats and Base Year
1.3 Market Analysis by Type
  1.3.1 Overview: Global Bio-based Isobutyric Acid Consumption Value by Type: 2021 Versus 2025 Versus 2032
  1.3.2 Purity: ?98%
  1.3.3 Purity: >98%
1.4 Market Analysis by Raw Material Source
  1.4.1 Overview: Global Bio-based Isobutyric Acid Consumption Value by Raw Material Source: 2021 Versus 2025 Versus 2032
  1.4.2 Food Crop-based Bio-Isobutyric Acid
  1.4.3 Non-food Biomass-based Bio-Isobutyric Acid
  1.4.4 Waste-derived Bio-Isobutyric Acid
1.5 Market Analysis by Purity Grade
  1.5.1 Overview: Global Bio-based Isobutyric Acid Consumption Value by Purity Grade: 2021 Versus 2025 Versus 2032
  1.5.2 Feed Grade
  1.5.3 Food Grade
  1.5.4 Pharmaceutical Grade
1.6 Market Analysis by Production Technology Route
  1.6.1 Overview: Global Bio-based Isobutyric Acid Consumption Value by Production Technology Route: 2021 Versus 2025 Versus 2032
  1.6.2 Microbial Fermentation Method
  1.6.3 Enzyme-catalyzed Method
  1.6.4 Metabolic Engineering Modification Route
1.7 Market Analysis by Application
  1.7.1 Overview: Global Bio-based Isobutyric Acid Consumption Value by Application: 2021 Versus 2025 Versus 2032
  1.7.2 Pharmaceutical
  1.7.3 Cosmetics
  1.7.4 Food Additives
  1.7.5 Plasticizer
  1.7.6 Others
1.8 Global Bio-based Isobutyric Acid Market Size & Forecast
  1.8.1 Global Bio-based Isobutyric Acid Consumption Value (2021 & 2025 & 2032)

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1.8.2 Global Bio-based Isobutyric Acid Sales Quantity (2021-2032)
1.8.3 Global Bio-based Isobutyric Acid Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Afyren
2.1.1 Afyren Details
2.1.2 Afyren Major Business
2.1.3 Afyren Bio-based Isobutyric Acid Product and Services
2.1.4 Afyren Bio-based Isobutyric Acid Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.1.5 Afyren Recent Developments/Updates
2.2 Lygos
2.2.1 Lygos Details
2.2.2 Lygos Major Business
2.2.3 Lygos Bio-based Isobutyric Acid Product and Services
2.2.4 Lygos Bio-based Isobutyric Acid Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
2.2.5 Lygos Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: BIO-BASED ISOBUTYRIC ACID BY MANUFACTURER

3.1 Global Bio-based Isobutyric Acid Sales Quantity by Manufacturer (2021-2026)
3.2 Global Bio-based Isobutyric Acid Revenue by Manufacturer (2021-2026)
3.3 Global Bio-based Isobutyric Acid Average Price by Manufacturer (2021-2026)
3.4 Market Share Analysis (2025)
3.4.1 Producer Shipments of Bio-based Isobutyric Acid by Manufacturer Revenue ($MM) and Market Share (%): 2025
3.4.2 Top 3 Bio-based Isobutyric Acid Manufacturer Market Share in 2025
3.4.3 Top 6 Bio-based Isobutyric Acid Manufacturer Market Share in 2025
3.5 Bio-based Isobutyric Acid Market: Overall Company Footprint Analysis
3.5.1 Bio-based Isobutyric Acid Market: Region Footprint
3.5.2 Bio-based Isobutyric Acid Market: Company Product Type Footprint
3.5.3 Bio-based Isobutyric Acid Market: Company Product Application Footprint
3.6 New Market Entrants and Barriers to Market Entry
3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

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info@marketpublishers.com

4.1 Global Bio-based Isobutyric Acid Market Size by Region
4.1.1 Global Bio-based Isobutyric Acid Sales Quantity by Region (2021-2032)
4.1.2 Global Bio-based Isobutyric Acid Consumption Value by Region (2021-2032)
4.1.3 Global Bio-based Isobutyric Acid Average Price by Region (2021-2032)
4.2 North America Bio-based Isobutyric Acid Consumption Value (2021-2032)
4.3 Europe Bio-based Isobutyric Acid Consumption Value (2021-2032)
4.4 Asia-Pacific Bio-based Isobutyric Acid Consumption Value (2021-2032)
4.5 South America Bio-based Isobutyric Acid Consumption Value (2021-2032)
4.6 Middle East & Africa Bio-based Isobutyric Acid Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

5.1 Global Bio-based Isobutyric Acid Sales Quantity by Type (2021-2032)
5.2 Global Bio-based Isobutyric Acid Consumption Value by Type (2021-2032)
5.3 Global Bio-based Isobutyric Acid Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Bio-based Isobutyric Acid Sales Quantity by Application (2021-2032)
6.2 Global Bio-based Isobutyric Acid Consumption Value by Application (2021-2032)
6.3 Global Bio-based Isobutyric Acid Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Bio-based Isobutyric Acid Sales Quantity by Type (2021-2032)
7.2 North America Bio-based Isobutyric Acid Sales Quantity by Application (2021-2032)
7.3 North America Bio-based Isobutyric Acid Market Size by Country
7.3.1 North America Bio-based Isobutyric Acid Sales Quantity by Country (2021-2032)
7.3.2 North America Bio-based Isobutyric Acid Consumption Value by Country (2021-2032)
7.3.3 United States Market Size and Forecast (2021-2032)
7.3.4 Canada Market Size and Forecast (2021-2032)
7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Bio-based Isobutyric Acid Sales Quantity by Type (2021-2032)
8.2 Europe Bio-based Isobutyric Acid Sales Quantity by Application (2021-2032)

+357 96 030922
info@marketpublishers.com

8.3 Europe Bio-based Isobutyric Acid Market Size by Country
8.3.1 Europe Bio-based Isobutyric Acid Sales Quantity by Country (2021-2032)
8.3.2 Europe Bio-based Isobutyric Acid Consumption Value by Country (2021-2032)
8.3.3 Germany Market Size and Forecast (2021-2032)
8.3.4 France Market Size and Forecast (2021-2032)
8.3.5 United Kingdom Market Size and Forecast (2021-2032)
8.3.6 Russia Market Size and Forecast (2021-2032)
8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Type (2021-2032)
9.2 Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Application (2021-2032)
9.3 Asia-Pacific Bio-based Isobutyric Acid Market Size by Region
9.3.1 Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Region (2021-2032)
9.3.2 Asia-Pacific Bio-based Isobutyric Acid Consumption Value by Region (2021-2032)
9.3.3 China Market Size and Forecast (2021-2032)
9.3.4 Japan Market Size and Forecast (2021-2032)
9.3.5 South Korea Market Size and Forecast (2021-2032)
9.3.6 India Market Size and Forecast (2021-2032)
9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Bio-based Isobutyric Acid Sales Quantity by Type (2021-2032)
10.2 South America Bio-based Isobutyric Acid Sales Quantity by Application (2021-2032)
10.3 South America Bio-based Isobutyric Acid Market Size by Country
10.3.1 South America Bio-based Isobutyric Acid Sales Quantity by Country (2021-2032)
10.3.2 South America Bio-based Isobutyric Acid Consumption Value by Country (2021-2032)
10.3.3 Brazil Market Size and Forecast (2021-2032)
10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

+357 96 030922
info@marketpublishers.com

11.1 Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Type (2021-2032)
11.2 Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Application (2021-2032)
11.3 Middle East & Africa Bio-based Isobutyric Acid Market Size by Country
11.3.1 Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Country (2021-2032)
11.3.2 Middle East & Africa Bio-based Isobutyric Acid Consumption Value by Country (2021-2032)
11.3.3 Turkey Market Size and Forecast (2021-2032)
11.3.4 Egypt Market Size and Forecast (2021-2032)
11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Bio-based Isobutyric Acid Market Drivers
12.2 Bio-based Isobutyric Acid Market Restraints
12.3 Bio-based Isobutyric Acid Trends Analysis
12.4 Porters Five Forces Analysis
12.4.1 Threat of New Entrants
12.4.2 Bargaining Power of Suppliers
12.4.3 Bargaining Power of Buyers
12.4.4 Threat of Substitutes
12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Bio-based Isobutyric Acid and Key Manufacturers
13.2 Manufacturing Costs Percentage of Bio-based Isobutyric Acid
13.3 Bio-based Isobutyric Acid Production Process
13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel
14.1.1 Direct to End-User
14.1.2 Distributors
14.2 Bio-based Isobutyric Acid Typical Distributors

+357 96 030922
info@marketpublishers.com

14.3 Bio-based Isobutyric Acid Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology
16.2 Research Process and Data Source
16.3 Disclaimer

+357 96 030922
info@marketpublishers.com

List Of Tables

LIST OF TABLES

Table 1. Global Bio-based Isobutyric Acid Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
Table 2. Global Bio-based Isobutyric Acid Consumption Value by Raw Material Source, (USD Million), 2021 & 2025 & 2032
Table 3. Global Bio-based Isobutyric Acid Consumption Value by Purity Grade, (USD Million), 2021 & 2025 & 2032
Table 4. Global Bio-based Isobutyric Acid Consumption Value by Production Technology Route, (USD Million), 2021 & 2025 & 2032
Table 5. Global Bio-based Isobutyric Acid Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Table 6. Afyren Basic Information, Manufacturing Base and Competitors
Table 7. Afyren Major Business
Table 8. Afyren Bio-based Isobutyric Acid Product and Services
Table 9. Afyren Bio-based Isobutyric Acid Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 10. Afyren Recent Developments/Updates
Table 11. Lygos Basic Information, Manufacturing Base and Competitors
Table 12. Lygos Major Business
Table 13. Lygos Bio-based Isobutyric Acid Product and Services
Table 14. Lygos Bio-based Isobutyric Acid Sales Quantity (Tons), Average Price (US$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 15. Lygos Recent Developments/Updates
Table 16. Global Bio-based Isobutyric Acid Sales Quantity by Manufacturer (2021-2026) & (Tons)
Table 17. Global Bio-based Isobutyric Acid Revenue by Manufacturer (2021-2026) & (USD Million)
Table 18. Global Bio-based Isobutyric Acid Average Price by Manufacturer (2021-2026) & (US$/Ton)
Table 19. Market Position of Manufacturers in Bio-based Isobutyric Acid, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
Table 20. Head Office and Bio-based Isobutyric Acid Production Site of Key Manufacturer
Table 21. Bio-based Isobutyric Acid Market: Company Product Type Footprint
Table 22. Bio-based Isobutyric Acid Market: Company Product Application Footprint
Table 23. Bio-based Isobutyric Acid New Market Entrants and Barriers to Market Entry

+357 96 030922
info@marketpublishers.com

Table 24. Bio-based Isobutyric Acid Mergers, Acquisition, Agreements, and Collaborations
Table 25. Global Bio-based Isobutyric Acid Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
Table 26. Global Bio-based Isobutyric Acid Sales Quantity by Region (2021-2026) & (Tons)
Table 27. Global Bio-based Isobutyric Acid Sales Quantity by Region (2027-2032) & (Tons)
Table 28. Global Bio-based Isobutyric Acid Consumption Value by Region (2021-2026) & (USD Million)
Table 29. Global Bio-based Isobutyric Acid Consumption Value by Region (2027-2032) & (USD Million)
Table 30. Global Bio-based Isobutyric Acid Average Price by Region (2021-2026) & (US$/Ton)
Table 31. Global Bio-based Isobutyric Acid Average Price by Region (2027-2032) & (US$/Ton)
Table 32. Global Bio-based Isobutyric Acid Sales Quantity by Type (2021-2026) & (Tons)
Table 33. Global Bio-based Isobutyric Acid Sales Quantity by Type (2027-2032) & (Tons)
Table 34. Global Bio-based Isobutyric Acid Consumption Value by Type (2021-2026) & (USD Million)
Table 35. Global Bio-based Isobutyric Acid Consumption Value by Type (2027-2032) & (USD Million)
Table 36. Global Bio-based Isobutyric Acid Average Price by Type (2021-2026) & (US$/Ton)
Table 37. Global Bio-based Isobutyric Acid Average Price by Type (2027-2032) & (US$/Ton)
Table 38. Global Bio-based Isobutyric Acid Sales Quantity by Application (2021-2026) & (Tons)
Table 39. Global Bio-based Isobutyric Acid Sales Quantity by Application (2027-2032) & (Tons)
Table 40. Global Bio-based Isobutyric Acid Consumption Value by Application (2021-2026) & (USD Million)
Table 41. Global Bio-based Isobutyric Acid Consumption Value by Application (2027-2032) & (USD Million)
Table 42. Global Bio-based Isobutyric Acid Average Price by Application (2021-2026) & (US$/Ton)
Table 43. Global Bio-based Isobutyric Acid Average Price by Application (2027-2032) &

+357 96 030922
info@marketpublishers.com

(US$/Ton)
Table 44. North America Bio-based Isobutyric Acid Sales Quantity by Type (2021-2026) & (Tons)
Table 45. North America Bio-based Isobutyric Acid Sales Quantity by Type (2027-2032) & (Tons)
Table 46. North America Bio-based Isobutyric Acid Sales Quantity by Application (2021-2026) & (Tons)
Table 47. North America Bio-based Isobutyric Acid Sales Quantity by Application (2027-2032) & (Tons)
Table 48. North America Bio-based Isobutyric Acid Sales Quantity by Country (2021-2026) & (Tons)
Table 49. North America Bio-based Isobutyric Acid Sales Quantity by Country (2027-2032) & (Tons)
Table 50. North America Bio-based Isobutyric Acid Consumption Value by Country (2021-2026) & (USD Million)
Table 51. North America Bio-based Isobutyric Acid Consumption Value by Country (2027-2032) & (USD Million)
Table 52. Europe Bio-based Isobutyric Acid Sales Quantity by Type (2021-2026) & (Tons)
Table 53. Europe Bio-based Isobutyric Acid Sales Quantity by Type (2027-2032) & (Tons)
Table 54. Europe Bio-based Isobutyric Acid Sales Quantity by Application (2021-2026) & (Tons)
Table 55. Europe Bio-based Isobutyric Acid Sales Quantity by Application (2027-2032) & (Tons)
Table 56. Europe Bio-based Isobutyric Acid Sales Quantity by Country (2021-2026) & (Tons)
Table 57. Europe Bio-based Isobutyric Acid Sales Quantity by Country (2027-2032) & (Tons)
Table 58. Europe Bio-based Isobutyric Acid Consumption Value by Country (2021-2026) & (USD Million)
Table 59. Europe Bio-based Isobutyric Acid Consumption Value by Country (2027-2032) & (USD Million)
Table 60. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Type (2021-2026) & (Tons)
Table 61. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Type (2027-2032) & (Tons)
Table 62. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Application (2021-2026) & (Tons)

+357 96 030922
info@marketpublishers.com

Table 63. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Application (2027-2032) & (Tons)
Table 64. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Region (2021-2026) & (Tons)
Table 65. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity by Region (2027-2032) & (Tons)
Table 66. Asia-Pacific Bio-based Isobutyric Acid Consumption Value by Region (2021-2026) & (USD Million)
Table 67. Asia-Pacific Bio-based Isobutyric Acid Consumption Value by Region (2027-2032) & (USD Million)
Table 68. South America Bio-based Isobutyric Acid Sales Quantity by Type (2021-2026) & (Tons)
Table 69. South America Bio-based Isobutyric Acid Sales Quantity by Type (2027-2032) & (Tons)
Table 70. South America Bio-based Isobutyric Acid Sales Quantity by Application (2021-2026) & (Tons)
Table 71. South America Bio-based Isobutyric Acid Sales Quantity by Application (2027-2032) & (Tons)
Table 72. South America Bio-based Isobutyric Acid Sales Quantity by Country (2021-2026) & (Tons)
Table 73. South America Bio-based Isobutyric Acid Sales Quantity by Country (2027-2032) & (Tons)
Table 74. South America Bio-based Isobutyric Acid Consumption Value by Country (2021-2026) & (USD Million)
Table 75. South America Bio-based Isobutyric Acid Consumption Value by Country (2027-2032) & (USD Million)
Table 76. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Type (2021-2026) & (Tons)
Table 77. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Type (2027-2032) & (Tons)
Table 78. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Application (2021-2026) & (Tons)
Table 79. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Application (2027-2032) & (Tons)
Table 80. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Country (2021-2026) & (Tons)
Table 81. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity by Country (2027-2032) & (Tons)
Table 82. Middle East & Africa Bio-based Isobutyric Acid Consumption Value by

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Country (2021-2026) & (USD Million)
Table 83. Middle East & Africa Bio-based Isobutyric Acid Consumption Value by Country (2027-2032) & (USD Million)
Table 84. Bio-based Isobutyric Acid Raw Material
Table 85. Key Manufacturers of Bio-based Isobutyric Acid Raw Materials
Table 86. Bio-based Isobutyric Acid Typical Distributors
Table 87. Bio-based Isobutyric Acid Typical Customers

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List Of Figures

LIST OF FIGURES

Figure 1. Bio-based Isobutyric Acid Picture
Figure 2. Global Bio-based Isobutyric Acid Revenue by Type, (USD Million), 2021 & 2025 & 2032
Figure 3. Global Bio-based Isobutyric Acid Revenue Market Share by Type in 2025
Figure 4. Purity: ?98% Examples
Figure 5. Purity: >98% Examples
Figure 6. Global Bio-based Isobutyric Acid Revenue by Raw Material Source, (USD Million), 2021 & 2025 & 2032
Figure 7. Global Bio-based Isobutyric Acid Revenue Market Share by Raw Material Source in 2025
Figure 8. Food Crop-based Bio-Isobutyric Acid Examples
Figure 9. Non-food Biomass-based Bio-Isobutyric Acid Examples
Figure 10. Waste-derived Bio-Isobutyric Acid Examples
Figure 11. Global Bio-based Isobutyric Acid Revenue by Purity Grade, (USD Million), 2021 & 2025 & 2032
Figure 12. Global Bio-based Isobutyric Acid Revenue Market Share by Purity Grade in 2025
Figure 13. Feed Grade Examples
Figure 14. Food Grade Examples
Figure 15. Pharmaceutical Grade Examples
Figure 16. Global Bio-based Isobutyric Acid Revenue by Production Technology Route, (USD Million), 2021 & 2025 & 2032
Figure 17. Global Bio-based Isobutyric Acid Revenue Market Share by Production Technology Route in 2025
Figure 18. Microbial Fermentation Method Examples
Figure 19. Enzyme-catalyzed Method Examples
Figure 20. Metabolic Engineering Modification Route Examples
Figure 21. Global Bio-based Isobutyric Acid Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
Figure 22. Global Bio-based Isobutyric Acid Revenue Market Share by Application in 2025
Figure 23. Pharmaceutical Examples
Figure 24. Cosmetics Examples
Figure 25. Food Additives Examples
Figure 26. Plasticizer Examples

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Figure 27. Others Examples
Figure 28. Global Bio-based Isobutyric Acid Consumption Value, (USD Million): 2021 & 2025 & 2032
Figure 29. Global Bio-based Isobutyric Acid Consumption Value and Forecast (2021-2032) & (USD Million)
Figure 30. Global Bio-based Isobutyric Acid Sales Quantity (2021-2032) & (Tons)
Figure 31. Global Bio-based Isobutyric Acid Price (2021-2032) & (US$/Ton)
Figure 32. Global Bio-based Isobutyric Acid Sales Quantity Market Share by Manufacturer in 2025
Figure 33. Global Bio-based Isobutyric Acid Revenue Market Share by Manufacturer in 2025
Figure 34. Producer Shipments of Bio-based Isobutyric Acid by Manufacturer Sales ($MM) and Market Share (%): 2025
Figure 35. Top 3 Bio-based Isobutyric Acid Manufacturer (Revenue) Market Share in 2025
Figure 36. Top 6 Bio-based Isobutyric Acid Manufacturer (Revenue) Market Share in 2025
Figure 37. Global Bio-based Isobutyric Acid Sales Quantity Market Share by Region (2021-2032)
Figure 38. Global Bio-based Isobutyric Acid Consumption Value Market Share by Region (2021-2032)
Figure 39. North America Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 40. Europe Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 41. Asia-Pacific Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 42. South America Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 43. Middle East & Africa Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 44. Global Bio-based Isobutyric Acid Sales Quantity Market Share by Type (2021-2032)
Figure 45. Global Bio-based Isobutyric Acid Consumption Value Market Share by Type (2021-2032)
Figure 46. Global Bio-based Isobutyric Acid Average Price by Type (2021-2032) & (US$/Ton)
Figure 47. Global Bio-based Isobutyric Acid Sales Quantity Market Share by Application (2021-2032)

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Figure 48. Global Bio-based Isobutyric Acid Revenue Market Share by Application (2021-2032)
Figure 49. Global Bio-based Isobutyric Acid Average Price by Application (2021-2032) & (US$/Ton)
Figure 50. North America Bio-based Isobutyric Acid Sales Quantity Market Share by Type (2021-2032)
Figure 51. North America Bio-based Isobutyric Acid Sales Quantity Market Share by Application (2021-2032)
Figure 52. North America Bio-based Isobutyric Acid Sales Quantity Market Share by Country (2021-2032)
Figure 53. North America Bio-based Isobutyric Acid Consumption Value Market Share by Country (2021-2032)
Figure 54. United States Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 55. Canada Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 56. Mexico Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 57. Europe Bio-based Isobutyric Acid Sales Quantity Market Share by Type (2021-2032)
Figure 58. Europe Bio-based Isobutyric Acid Sales Quantity Market Share by Application (2021-2032)
Figure 59. Europe Bio-based Isobutyric Acid Sales Quantity Market Share by Country (2021-2032)
Figure 60. Europe Bio-based Isobutyric Acid Consumption Value Market Share by Country (2021-2032)
Figure 61. Germany Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 62. France Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 63. United Kingdom Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 64. Russia Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 65. Italy Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 66. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity Market Share by Type (2021-2032)
Figure 67. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity Market Share by

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Application (2021-2032)
Figure 68. Asia-Pacific Bio-based Isobutyric Acid Sales Quantity Market Share by Region (2021-2032)
Figure 69. Asia-Pacific Bio-based Isobutyric Acid Consumption Value Market Share by Region (2021-2032)
Figure 70. China Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 71. Japan Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 72. South Korea Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 73. India Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 74. Southeast Asia Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 75. Australia Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 76. South America Bio-based Isobutyric Acid Sales Quantity Market Share by Type (2021-2032)
Figure 77. South America Bio-based Isobutyric Acid Sales Quantity Market Share by Application (2021-2032)
Figure 78. South America Bio-based Isobutyric Acid Sales Quantity Market Share by Country (2021-2032)
Figure 79. South America Bio-based Isobutyric Acid Consumption Value Market Share by Country (2021-2032)
Figure 80. Brazil Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 81. Argentina Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 82. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity Market Share by Type (2021-2032)
Figure 83. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity Market Share by Application (2021-2032)
Figure 84. Middle East & Africa Bio-based Isobutyric Acid Sales Quantity Market Share by Country (2021-2032)
Figure 85. Middle East & Africa Bio-based Isobutyric Acid Consumption Value Market Share by Country (2021-2032)
Figure 86. Turkey Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)

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Figure 87. Egypt Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 88. Saudi Arabia Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 89. South Africa Bio-based Isobutyric Acid Consumption Value (2021-2032) & (USD Million)
Figure 90. Bio-based Isobutyric Acid Market Drivers
Figure 91. Bio-based Isobutyric Acid Market Restraints
Figure 92. Bio-based Isobutyric Acid Market Trends
Figure 93. Porters Five Forces Analysis
Figure 94. Manufacturing Cost Structure Analysis of Bio-based Isobutyric Acid in 2025
Figure 95. Manufacturing Process Analysis of Bio-based Isobutyric Acid
Figure 96. Bio-based Isobutyric Acid Industrial Chain
Figure 97. Sales Channel: Direct to End-User vs Distributors
Figure 98. Direct Channel Pros & Cons
Figure 99. Indirect Channel Pros & Cons
Figure 100. Methodology
Figure 101. Research Process and Data Source

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