

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

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Abstracts

The global Bio-based Polyethylene market size is expected to reach \$ 534 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

Bio-based polyethylene is polyethylene in which part or all of the carbon originates from renewable, biogenic sources, while remaining chemically identical to conventional PE; its core function is to deliver drop-in performance for films, moldings and pipes with a verified share of biobased carbon or certified bio-attributed content. Biobased content is determined by radiocarbon (^{14}C) methods under standards such as ISO 16620-2 and ASTM D6866, which quantify the fraction of biogenic carbon in resins and products. These methods underpin transparent claims and are widely referenced by certification and procurement programs. In parallel, the ISCC PLUS system enables mass-balance attribution of renewable feedstocks like bio-naphtha to polyolefin outputs across complex steam-cracker networks, providing third-party traceability for “bio-attributed” PE grades supplied as identical-spec drop-ins.

Upstream, renewable carbon primarily comes via two pathways. The first is segregated bio-ethylene produced from bio-ethanol dehydration, historically exemplified by commercial sugarcane routes; this yields neat biobased PE with measurable biogenic carbon. The second is bio-attributed production via ISCC PLUS mass balance, where bio-naphtha or bio-circular oils are co-cracked with fossil feed, and certified bookkeeping allocates renewable content to polymer batches. Multiple producers offer one or both: Braskem has long supplied “I’m green” bio-PE from ethanol-to-ethylene; SABIC provides certified renewable PE made from non-food bio-feedstocks within its TRUCIRCLE portfolio; Borealis markets Borenewables PE via mass balance; INEOS has commercial bio-based HDPE applications; and LyondellBasell, TotalEnergies, Repsol, Versalis and others supply ISCC PLUS-certified, bio-attributed PE across films, rigid

packaging, healthcare and pipe grades. In Japan, Prime Polymer and Dow-Mitsui Polychemicals have announced biomass-based LDPE/EVA and mass-balance programs, while companies like Carmel Olefins, LG Chem, Sumitomo Chemical, Reliance and Westlake have ISCC PLUS certifications allowing bio-attributed polyolefin offerings subject to site scope. Typical procurement runs through converter frameworks or brand owner programs, often under annual contracts specifying certificate transfer and sustainability declarations; industry gross margins for prime PE producers typically land in the low-to-mid-twenties on an EXW basis due to integration, certification costs, and feedstock premia. In the current market, global production is around 230 k tonnes, with an average selling price of about 1543 USD per tonne on an EXW basis. Concentration is higher in segregated ethanol-based supply and more diffuse under mass-balance programs; overall, a small set of integrated suppliers and certified crackers account for most revenue in 2024. Demand is anchored in flexible packaging and rigid packaging, with healthcare and pipe applications growing where certification, change-control, and performance parity are critical. For 2025–2031, directionally, growth is supported by corporate decarbonization targets, certified-content mandates, and broader ISCC PLUS adoption, while bottlenecks include renewable feedstock availability, certification scope by site, and the economics of bio-naphtha versus fossil naphtha. Standards such as ISO 16620-2 and ASTM D6866 will continue to anchor verifiable claims, while mass-balance certification frameworks from ISCC PLUS remain the dominant chain-of-custody mechanism for allocating renewable content to PE product slates.

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

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

Highlights and key features of the study

Global Bio-based Polyethylene total production and demand, 2021-2032, (K MT)

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

Global Bio-based Polyethylene production by region & country, production, value,

CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

Global Bio-based Polyethylene consumption by region & country, CAGR, 2021-2032 & (K MT)

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

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

Global Bio-based Polyethylene production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

Global Bio-based Polyethylene production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K MT)

This report profiles key players in the global Bio-based Polyethylene 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 Braskem, SABIC, Borealis, INEOS Olefins & Polymers, TotalEnergies Polymers, LyondellBasell, Repsol, Prime Polymer, Dow-Mitsui Polychemicals, LG Chem, 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 Polyethylene market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K MT) and average price (USD/MT) 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 Polyethylene Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Bio-based Polyethylene Market, Segmentation by Type:

HDPE

LLDPE

LDPE

Global Bio-based Polyethylene Market, Segmentation by Certification:

ISCC PLUS

REDcert

Other Recognized

Global Bio-based Polyethylene Market, Segmentation by Form:

Pellets

Powder

Compounds

Global Bio-based Polyethylene Market, Segmentation by Source Route:

Ethanol-to-Ethylene

Bio-Attributed (Mass Balance)

Bio-Circular (Mass Balance)

Global Bio-based Polyethylene Market, Segmentation by Application:

Flexible Packaging

Rigid Packaging

Pipe

Healthcare Packaging

Consumer Goods

Agriculture

Others

Companies Profiled:

Braskem

SABIC

Borealis

INEOS Olefins & Polymers

TotalEnergies Polymers

LyondellBasell

Repsol

Prime Polymer

Dow-Mitsui Polychemicals

LG Chem

Westlake

Versalis

Formosa Plastics

Sinopec

Key Questions Answered:

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

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