

Global Bio-Based Polyurethane Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bio-Based Polyurethane market size is expected to reach \$ 149 million by 2032, rising at a market growth of 5.1% CAGR during the forecast period (2026-2032).

Bio based polyurethane refers to product use renewable biological materials, including crops, trees, other plants and their residues as raw materials, polyurethane products produced through biochemical, physical and other methods. Bio-based polymers generally have a lower CO₂ footprint and are associated with the concept of sustainability. Because of concerns about the depletion of fossil resources and the global warming associated with the use of petrochemicals, new bio-based polymers continue to be developed. In 2024, global Bio-Based Polyurethane production reached approximately 15226 MT, with an average global market price of around US\$ 6525 per MT.

The bio-based polyurethane (PU) market is centered on polyurethanes derived from renewable raw materials such as vegetable oils, starch, and other biomass sources, offering an eco-friendly alternative to conventional petroleum-based PU. These materials are increasingly in demand due to rising global awareness of sustainability, stricter environmental regulations, and corporate commitments to reduce carbon footprints. Bio-based PUs retain the versatile properties of traditional polyurethane—such as flexibility, durability, abrasion resistance, and insulation—making them suitable for use in coatings, adhesives, sealants, elastomers, and foams. The push toward green chemistry and circular economy principles is a key driver, especially in industries such as automotive, furniture, packaging, and construction.

Regionally, Europe and North America are leading the adoption of bio-based PU, driven by stringent regulations, strong government incentives, and a mature customer base

that values sustainable products. Meanwhile, Asia-Pacific is emerging as the fastest-growing market, propelled by rapid industrialization, urbanization, and rising consumer demand for eco-friendly materials in countries like China, Japan, and India. Major challenges include higher production costs compared to conventional PU and limited large-scale availability of bio-based feedstocks. However, ongoing innovations in feedstock processing, bio-refinery integration, and advances in material performance are expected to lower costs and broaden application areas. Overall, the bio-based polyurethane market is poised for steady growth as industries seek sustainable solutions without compromising on performance.

This report studies the global Bio-Based Polyurethane production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Bio-Based Polyurethane total production and demand, 2021-2032, (K MT)

Global Bio-Based Polyurethane total production value, 2021-2032, (USD Million)

Global Bio-Based Polyurethane production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K MT), (based on production site)

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

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

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

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

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

This report profiles key players in the global Bio-Based Polyurethane 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 BASF, Lubrizol, Dow Chemical, SNP, Mitsui Chemicals, Rampf Holding, Johnson Controls, Rhino Linings, Bayer Material, Woodbridge Foam, 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 Polyurethane 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 Polyurethane Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Bio-Based Polyurethane Market, Segmentation by Type:

Rigid Foams

Flexible Foams

Case (Coatings, Adhesives, Sealants and Elastomers)

Others

Global Bio-Based Polyurethane Market, Segmentation by Application:

Construction

Automotive

Electronics & Electrical Appliances

Others

Companies Profiled:

BASF

Lubrizol

Dow Chemical

SNP

Mitsui Chemicals

Rampf Holding

Johnson Controls

Rhino Linings

Bayer Material

Woodbridge Foam

Malama Composites

TSE Industries

Key Questions Answered:

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

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