

Global Bio-coal Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Bio-coal market size is expected to reach \$ 4329 million by 2032, rising at a market growth of 18.4% CAGR during the forecast period (2026-2032).

Bio-coal is a high-calorific-value solid fuel produced from biomass sources such as wood chips, forestry residues, crop straw, palm shells, and energy crops, following processes such as baking, carbonization, pyrolysis, or hydrothermal carbonization.

In 2025, global bio-coal sales reached 4,744 thousand tons, with an average price of \$271 per ton.

Development Trends

Upgrading from “Standard Wood Pellets” to “Black Pellets/Bio-coal”

Standard white wood pellets have shortcomings in storage, transportation, moisture resistance, pulverization, and compatibility with coal-fired power systems. Black pellets/bio-coal offer higher hydrophobicity, grindability, and coal compatibility, thereby reducing retrofitting costs in existing coal-fired power or industrial combustion systems.

Japan and Europe Are the Regions with the Clearest Demand

Japan, which still has a significant coal-fired power capacity but faces pressure to reduce carbon emissions, is one of the most active markets for black pellets and biocoal.

Biocarbon for Metallurgy Becomes a Second Growth Curve

Steel, ferrosilicon, aluminum, and alloy smelting require fixed carbon. Biocoal/biocarbon can serve as substitutes for PCI coal, petroleum coke, and certain reducing carbon sources. Vow Green Metals has signed a long-term biocarbon offtake agreement with Elkem, with Elkem aiming to increase the global share of biocarbon to 50% by 2030; Kobe Steel also plans to use torrefied wood pellets in steel production.

Industry Shifts from Pilot Lines to Early Commercialization

Over the past decade, many torrefaction projects have remained at the pilot or demonstration stage. Clearer commercialization milestones are beginning to emerge between 2024 and 2026.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Bio-coal 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 Enviva Inc?US?, Drax Biomass?GB?, Pinnacle Renewable Energy?CA?, RWE Innogy?DE?, Sumitomo Forestry?JP?, E.ON?DE?, Biolac Energy?FI?, Kaidi Ecology?CN?, Qiquan Group?CN?, Dison Co., Ltd.?CN?, 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-coal market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Bio-coal Market, Segmentation by Type:

Granular

Lump / Powder

Global Bio-coal Market, Segmentation by Feedstock Sources:

Forestry-based

Agriculture-based

Waste-based

Global Bio-coal Market, Segmentation by Sales Channels:

Direct Sales

Distribution

Global Bio-coal Market, Segmentation by Application:

Coal-Fired/Combined Heat and Power Co-firing

Industrial Boilers/District Heating

Steel/Metallurgical Reduction Carbon

Other

Companies Profiled:

Enviva Inc?US?

Drax Biomass?GB?

Pinnacle Renewable Energy?CA?

RWE Innogy?DE?

Sumitomo Forestry?JP?

E.ON?DE?

Biolac Energy?FI?

Kaidi Ecology?CN?

Qiquan Group?CN?

Dison Co., Ltd.?CN?

Baichuan Changyin?CN?

Longli Bio-tech?CN?

BIOMAC s.r.o.?CZ?

BMK Woods?US?

BIOGRA?EU?

Green Biocoal?IN?

Lignetics?US?

EcoBlaze?EU?

Wood Energo?EU?

BALT WOOD?EU?

Idemitsu Kosan?JP?

Key Questions Answered:

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

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