

Global Coal-based Biodegradable Plastic Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Coal-based Biodegradable Plastic market size is expected to reach \$ 400 million by 2032, rising at a market growth of 9.0% CAGR during the forecast period (2026-2032).

Coal-based Biodegradable Plastic refers to biodegradable polymer materials produced from coal chemical feedstocks such as syngas, ethylene glycol, 1,4-butanediol, glycolate esters and oxalate esters, and further processed through polymerization, copolymerization or compounding. The main product scope includes coal-based PGA, coal-based PBAT, coal-based PBS/PBSA and related biodegradable compound materials. These materials combine stable coal chemical feedstock supply, mature industrial chain support and biodegradable plastic application attributes, and are mainly used in packaging films and bags, disposable tableware and food packaging, agricultural mulch films, oilfield temporary plugging materials, injection-molded products and other industrial or specialty applications. Upstream raw materials mainly include coal, syngas, carbon monoxide, methanol, ethylene glycol, 1,4-butanediol, succinic acid, adipic acid, terephthalic acid, methyl glycolate, catalysts and additives. Major downstream customers include biodegradable material compounders, packaging material companies, agricultural film producers, oilfield chemical companies, disposable product manufacturers, injection molding companies and end-brand customers. On an ex-factory price basis, global Coal-based Biodegradable Plastic effective capacity in 2025 is estimated at about 210,000 tons, while global sales volume is estimated at about 72,638 tons, with an average ex-factory price of about USD 2,950 per ton. As this value chain is mainly concentrated in China, actual sales are still affected by the validation progress of downstream biodegradable packaging, agricultural films, oilfield temporary plugging materials and specialty applications. The average industry gross margin is estimated at about 10%–24% in 2025, with relatively higher margins in high-

barrier PGA, oilfield temporary plugging and specialty applications, and relatively lower margins in general packaging film and bag materials and compounded materials due to competition, operating rates and raw material price fluctuations.

The global Coal-based Biodegradable Plastic market is still in the stage of industrial ramp-up and application validation, with the core value chain and production capacity mainly concentrated in China. Overseas companies are more suitable as benchmark producers of related biodegradable plastics such as PGA and PBAT, rather than typical coal-based route manufacturers. The current market is mainly composed of coal-based PGA, coal-based BDO route PBAT/PBS, and related compounded materials, with demand mainly coming from packaging films and bags, disposable foodservice packaging, agricultural mulch films, oilfield temporary plugging materials, and specialty industrial materials. Compared with bio-based materials such as PLA and PHA, coal-based biodegradable plastics rely on coal chemical feedstocks, regional chemical parks, and integrated production facilities, giving them certain advantages in supply stability and scale-up potential. However, market acceptance still depends on product cost, processing compatibility, degradation certification, carbon footprint assessment, and end-use validation. Future market growth will mainly benefit from the extension of the coal chemical value chain into higher-value new materials, continued policy support for biodegradable materials, plastic substitution demand in packaging and agriculture, and rising demand for functional biodegradable materials in oilfield and industrial applications. Coal-based PGA has differentiated potential in high-barrier packaging, oilfield temporary plugging, and specialty materials, while coal-based PBAT and PBS materials are more suitable for blending with starch, PLA, calcium carbonate, and other systems for films, bags, disposable products, and selected injection-molded products. As polymerization processes, compounding formulations, and processing technologies continue to mature, coal-based biodegradable plastics are expected to move gradually from demonstration projects and policy-driven demand toward broader commercial application validation. Key market drivers include the industrial upgrading needs of Chinese coal chemical companies and downstream demand for biodegradable materials with controllable cost, stable supply, and clearly defined performance. For coal chemical companies, developing PGA, PBAT, PBS and related materials can increase the added value of basic chemicals such as syngas, ethylene glycol, BDO, glycolate esters, and succinic acid, while extending the value chain into resins, compounded materials, and end products. For downstream customers, if coal-based biodegradable plastics can achieve a balanced performance in cost, processability, mechanical properties, barrier properties, and degradability, they may gain substitution opportunities in packaging, agriculture, oilfield, and industrial materials. Future competition will shift from capacity expansion alone toward cost control, material

compounding capability, application development capability, and customer qualification capability. The main market barriers include uneven end-market demand, low capacity utilization, relatively high costs for some products, and strong competition from PLA, PBAT, PHA, bio-based PBS, and conventional plastic alternatives. The coal-based attribute has resource and cost advantages within China's coal chemical value chain, but it may face challenges in carbon footprint, environmental perception, and brand acceptance in international markets, especially for premium packaging and export-oriented customers. More complete degradation certification, low-carbon assessment, and life-cycle data will be needed. In addition, although PGA has clear performance differentiation, improvements in processing window, brittleness, cost reduction, and end-use validation still require time. Overall, the Coal-based Biodegradable Plastic market has medium- to long-term growth potential, while the near-term market will be characterized by steady volume growth, structural differentiation, and gradually clearer application scenarios.

This report studies the global Coal-based Biodegradable Plastic production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Coal-based Biodegradable Plastic total production and demand, 2021-2032, (Kilotons)

Global Coal-based Biodegradable Plastic total production value, 2021-2032, (USD Million)

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

Global Coal-based Biodegradable Plastic consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Coal-based Biodegradable Plastic domestic production, consumption, key domestic manufacturers and share

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

Global Coal-based Biodegradable Plastic production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Coal-based Biodegradable Plastic production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Coal-based Biodegradable Plastic 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 China Energy Investment Corporation, Xinjiang Lanshan Tunhe Technology, Anhui Haoyuan Chemical Group, Shanghai Pujing Chemical, China National Chemical Engineering Group, Shanxi Jinhui Energy Group, Hubei Yihua Group, Kureha Corporation, BASF, 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 Coal-based Biodegradable Plastic 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 Coal-based Biodegradable Plastic Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Coal-based Biodegradable Plastic Market, Segmentation by Type:

Coal-based PGA

Coal-based PBAT

Coal-based PBS and PBSA

Others

Global Coal-based Biodegradable Plastic Market, Segmentation by Product Form:

Coal-to-Syngas Route

Coal-based BDO Route

Coal-based Ethylene Glycol Route

Others

Global Coal-based Biodegradable Plastic Market, Segmentation by Application:

Packaging

Foodservice and Disposable Products

Agriculture

Industrial

Other

Companies Profiled:

China Energy Investment Corporation

Xinjiang Lanshan Tunhe Technology

Anhui Haoyuan Chemical Group

Shanghai Pujing Chemical

China National Chemical Engineering Group

Shanxi Jinhui Energy Group

Hubei Yihua Group

Kureha Corporation

BASF

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

- 1.1 Coal-based Biodegradable Plastic Introduction
- 1.2 World Coal-based Biodegradable Plastic Supply & Forecast
 - 1.2.1 World Coal-based Biodegradable Plastic Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Coal-based Biodegradable Plastic Production (2021-2032)
 - 1.2.3 World Coal-based Biodegradable Plastic Pricing Trends (2021-2032)
- 1.3 World Coal-based Biodegradable Plastic Production by Region (Based on Production Site)
 - 1.3.1 World Coal-based Biodegradable Plastic Production Value by Region (2021-2032)
 - 1.3.2 World Coal-based Biodegradable Plastic Production by Region (2021-2032)
 - 1.3.3 World Coal-based Biodegradable Plastic Average Price by Region (2021-2032)
 - 1.3.4 North America Coal-based Biodegradable Plastic Production (2021-2032)
 - 1.3.5 Europe Coal-based Biodegradable Plastic Production (2021-2032)
 - 1.3.6 China Coal-based Biodegradable Plastic Production (2021-2032)
 - 1.3.7 Japan Coal-based Biodegradable Plastic Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Coal-based Biodegradable Plastic Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Coal-based Biodegradable Plastic Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Coal-based Biodegradable Plastic Demand (2021-2032)
- 2.2 World Coal-based Biodegradable Plastic Consumption by Region
 - 2.2.1 World Coal-based Biodegradable Plastic Consumption by Region (2021-2026)
 - 2.2.2 World Coal-based Biodegradable Plastic Consumption Forecast by Region (2027-2032)
- 2.3 United States Coal-based Biodegradable Plastic Consumption (2021-2032)
- 2.4 China Coal-based Biodegradable Plastic Consumption (2021-2032)
- 2.5 Europe Coal-based Biodegradable Plastic Consumption (2021-2032)
- 2.6 Japan Coal-based Biodegradable Plastic Consumption (2021-2032)
- 2.7 South Korea Coal-based Biodegradable Plastic Consumption (2021-2032)
- 2.8 ASEAN Coal-based Biodegradable Plastic Consumption (2021-2032)
- 2.9 India Coal-based Biodegradable Plastic Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Coal-based Biodegradable Plastic Production Value by Manufacturer (2021-2026)

3.2 World Coal-based Biodegradable Plastic Production by Manufacturer (2021-2026)

3.3 World Coal-based Biodegradable Plastic Average Price by Manufacturer (2021-2026)

3.4 Coal-based Biodegradable Plastic Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Coal-based Biodegradable Plastic Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Coal-based Biodegradable Plastic in 2025

3.5.3 Global Concentration Ratios (CR8) for Coal-based Biodegradable Plastic in 2025

3.6 Coal-based Biodegradable Plastic Market: Overall Company Footprint Analysis

3.6.1 Coal-based Biodegradable Plastic Market: Region Footprint

3.6.2 Coal-based Biodegradable Plastic Market: Company Product Type Footprint

3.6.3 Coal-based Biodegradable Plastic Market: Company Product Application

Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Coal-based Biodegradable Plastic Production Value Comparison

4.1.1 United States VS China: Coal-based Biodegradable Plastic Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Coal-based Biodegradable Plastic Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Coal-based Biodegradable Plastic Production Comparison

4.2.1 United States VS China: Coal-based Biodegradable Plastic Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Coal-based Biodegradable Plastic Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Coal-based Biodegradable Plastic Consumption Comparison

4.3.1 United States VS China: Coal-based Biodegradable Plastic Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Coal-based Biodegradable Plastic Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Coal-based Biodegradable Plastic Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Coal-based Biodegradable Plastic Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Coal-based Biodegradable Plastic Production Value (2021-2026)

4.4.3 United States Based Manufacturers Coal-based Biodegradable Plastic Production (2021-2026)

4.5 China Based Coal-based Biodegradable Plastic Manufacturers and Market Share

4.5.1 China Based Coal-based Biodegradable Plastic Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Coal-based Biodegradable Plastic Production Value (2021-2026)

4.5.3 China Based Manufacturers Coal-based Biodegradable Plastic Production (2021-2026)

4.6 Rest of World Based Coal-based Biodegradable Plastic Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Coal-based Biodegradable Plastic Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Coal-based Biodegradable Plastic Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Coal-based PGA

5.2.2 Coal-based PBAT

5.2.3 Coal-based PBS and PBSA

5.2.4 Others

5.3 Market Segment by Type

5.3.1 World Coal-based Biodegradable Plastic Production by Type (2021-2032)

- 5.3.2 World Coal-based Biodegradable Plastic Production Value by Type (2021-2032)
- 5.3.3 World Coal-based Biodegradable Plastic Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY PRODUCT FORM

6.1 World Coal-based Biodegradable Plastic Market Size Overview by Product Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Product Form

- 6.2.1 Coal-to-Syngas Route
- 6.2.2 Coal-based BDO Route
- 6.2.3 Coal-based Ethylene Glycol Route
- 6.2.4 Others

6.3 Market Segment by Product Form

- 6.3.1 World Coal-based Biodegradable Plastic Production by Product Form (2021-2032)
- 6.3.2 World Coal-based Biodegradable Plastic Production Value by Product Form (2021-2032)
- 6.3.3 World Coal-based Biodegradable Plastic Average Price by Product Form (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Coal-based Biodegradable Plastic Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

- 7.2.1 Packaging
- 7.2.2 Foodservice and Disposable Products
- 7.2.3 Agriculture
- 7.2.4 Industrial
- 7.2.5 Other

7.3 Market Segment by Application

- 7.3.1 World Coal-based Biodegradable Plastic Production by Application (2021-2032)
- 7.3.2 World Coal-based Biodegradable Plastic Production Value by Application (2021-2032)
- 7.3.3 World Coal-based Biodegradable Plastic Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 China Energy Investment Corporation

8.1.1 China Energy Investment Corporation Details

8.1.2 China Energy Investment Corporation Major Business

8.1.3 China Energy Investment Corporation Coal-based Biodegradable Plastic Product and Services

8.1.4 China Energy Investment Corporation Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 China Energy Investment Corporation Recent Developments/Updates

8.1.6 China Energy Investment Corporation Competitive Strengths & Weaknesses

8.2 Xinjiang Lanshan Tunhe Technology

8.2.1 Xinjiang Lanshan Tunhe Technology Details

8.2.2 Xinjiang Lanshan Tunhe Technology Major Business

8.2.3 Xinjiang Lanshan Tunhe Technology Coal-based Biodegradable Plastic Product and Services

8.2.4 Xinjiang Lanshan Tunhe Technology Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 Xinjiang Lanshan Tunhe Technology Recent Developments/Updates

8.2.6 Xinjiang Lanshan Tunhe Technology Competitive Strengths & Weaknesses

8.3 Anhui Haoyuan Chemical Group

8.3.1 Anhui Haoyuan Chemical Group Details

8.3.2 Anhui Haoyuan Chemical Group Major Business

8.3.3 Anhui Haoyuan Chemical Group Coal-based Biodegradable Plastic Product and Services

8.3.4 Anhui Haoyuan Chemical Group Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.3.5 Anhui Haoyuan Chemical Group Recent Developments/Updates

8.3.6 Anhui Haoyuan Chemical Group Competitive Strengths & Weaknesses

8.4 Shanghai Pujing Chemical

8.4.1 Shanghai Pujing Chemical Details

8.4.2 Shanghai Pujing Chemical Major Business

8.4.3 Shanghai Pujing Chemical Coal-based Biodegradable Plastic Product and Services

8.4.4 Shanghai Pujing Chemical Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 Shanghai Pujing Chemical Recent Developments/Updates

8.4.6 Shanghai Pujing Chemical Competitive Strengths & Weaknesses

8.5 China National Chemical Engineering Group

8.5.1 China National Chemical Engineering Group Details

8.5.2 China National Chemical Engineering Group Major Business

8.5.3 China National Chemical Engineering Group Coal-based Biodegradable Plastic Product and Services

8.5.4 China National Chemical Engineering Group Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 China National Chemical Engineering Group Recent Developments/Updates

8.5.6 China National Chemical Engineering Group Competitive Strengths & Weaknesses

8.6 Shanxi Jinhui Energy Group

8.6.1 Shanxi Jinhui Energy Group Details

8.6.2 Shanxi Jinhui Energy Group Major Business

8.6.3 Shanxi Jinhui Energy Group Coal-based Biodegradable Plastic Product and Services

8.6.4 Shanxi Jinhui Energy Group Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 Shanxi Jinhui Energy Group Recent Developments/Updates

8.6.6 Shanxi Jinhui Energy Group Competitive Strengths & Weaknesses

8.7 Hubei Yihua Group

8.7.1 Hubei Yihua Group Details

8.7.2 Hubei Yihua Group Major Business

8.7.3 Hubei Yihua Group Coal-based Biodegradable Plastic Product and Services

8.7.4 Hubei Yihua Group Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.7.5 Hubei Yihua Group Recent Developments/Updates

8.7.6 Hubei Yihua Group Competitive Strengths & Weaknesses

8.8 Kureha Corporation

8.8.1 Kureha Corporation Details

8.8.2 Kureha Corporation Major Business

8.8.3 Kureha Corporation Coal-based Biodegradable Plastic Product and Services

8.8.4 Kureha Corporation Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.8.5 Kureha Corporation Recent Developments/Updates

8.8.6 Kureha Corporation Competitive Strengths & Weaknesses

8.9 BASF

8.9.1 BASF Details

8.9.2 BASF Major Business

8.9.3 BASF Coal-based Biodegradable Plastic Product and Services

8.9.4 BASF Coal-based Biodegradable Plastic Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.9.5 BASF Recent Developments/Updates

8.9.6 BASF Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Coal-based Biodegradable Plastic Industry Chain

9.2 Coal-based Biodegradable Plastic Upstream Analysis

9.2.1 Coal-based Biodegradable Plastic Core Raw Materials

9.2.2 Main Manufacturers of Coal-based Biodegradable Plastic Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Coal-based Biodegradable Plastic Production Mode

9.6 Coal-based Biodegradable Plastic Procurement Model

9.7 Coal-based Biodegradable Plastic Industry Sales Model and Sales Channels

9.7.1 Coal-based Biodegradable Plastic Sales Model

9.7.2 Coal-based Biodegradable Plastic Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Coal-based Biodegradable Plastic Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Coal-based Biodegradable Plastic Production Value by Region (2021-2026) & (USD Million)

Table 3. World Coal-based Biodegradable Plastic Production Value by Region (2027-2032) & (USD Million)

Table 4. World Coal-based Biodegradable Plastic Production Value Market Share by Region (2021-2026)

Table 5. World Coal-based Biodegradable Plastic Production Value Market Share by Region (2027-2032)

Table 6. World Coal-based Biodegradable Plastic Production by Region (2021-2026) & (Kilotons)

Table 7. World Coal-based Biodegradable Plastic Production by Region (2027-2032) & (Kilotons)

Table 8. World Coal-based Biodegradable Plastic Production Market Share by Region (2021-2026)

Table 9. World Coal-based Biodegradable Plastic Production Market Share by Region (2027-2032)

Table 10. World Coal-based Biodegradable Plastic Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Coal-based Biodegradable Plastic Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Coal-based Biodegradable Plastic Major Market Trends

Table 13. World Coal-based Biodegradable Plastic Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Kilotons)

Table 14. World Coal-based Biodegradable Plastic Consumption by Region (2021-2026) & (Kilotons)

Table 15. World Coal-based Biodegradable Plastic Consumption Forecast by Region (2027-2032) & (Kilotons)

Table 16. World Coal-based Biodegradable Plastic Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Coal-based Biodegradable Plastic Producers in 2025

Table 18. World Coal-based Biodegradable Plastic Production by Manufacturer (2021-2026) & (Kilotons)

Table 19. Production Market Share of Key Coal-based Biodegradable Plastic Producers in 2025

Table 20. World Coal-based Biodegradable Plastic Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Coal-based Biodegradable Plastic Company Evaluation Quadrant

Table 22. World Coal-based Biodegradable Plastic Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Coal-based Biodegradable Plastic Production Site of Key Manufacturer

Table 24. Coal-based Biodegradable Plastic Market: Company Product Type Footprint

Table 25. Coal-based Biodegradable Plastic Market: Company Product Application Footprint

Table 26. Coal-based Biodegradable Plastic Competitive Factors

Table 27. Coal-based Biodegradable Plastic New Entrant and Capacity Expansion Plans

Table 28. Coal-based Biodegradable Plastic Mergers & Acquisitions Activity

Table 29. United States VS China Coal-based Biodegradable Plastic Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Coal-based Biodegradable Plastic Production Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 31. United States VS China Coal-based Biodegradable Plastic Consumption Comparison, (2021 & 2025 & 2032) & (Kilotons)

Table 32. United States Based Coal-based Biodegradable Plastic Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Coal-based Biodegradable Plastic Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Coal-based Biodegradable Plastic Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Coal-based Biodegradable Plastic Production (2021-2026) & (Kilotons)

Table 36. United States Based Manufacturers Coal-based Biodegradable Plastic Production Market Share (2021-2026)

Table 37. China Based Coal-based Biodegradable Plastic Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Coal-based Biodegradable Plastic Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Coal-based Biodegradable Plastic Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Coal-based Biodegradable Plastic Production,

(2021-2026) & (Kilotons)

Table 41. China Based Manufacturers Coal-based Biodegradable Plastic Production Market Share (2021-2026)

Table 42. Rest of World Based Coal-based Biodegradable Plastic Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production, (2021-2026) & (Kilotons)

Table 46. Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production Market Share (2021-2026)

Table 47. World Coal-based Biodegradable Plastic Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Coal-based Biodegradable Plastic Production by Type (2021-2026) & (Kilotons)

Table 49. World Coal-based Biodegradable Plastic Production by Type (2027-2032) & (Kilotons)

Table 50. World Coal-based Biodegradable Plastic Production Value by Type (2021-2026) & (USD Million)

Table 51. World Coal-based Biodegradable Plastic Production Value by Type (2027-2032) & (USD Million)

Table 52. World Coal-based Biodegradable Plastic Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Coal-based Biodegradable Plastic Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Coal-based Biodegradable Plastic Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Table 55. World Coal-based Biodegradable Plastic Production by Product Form (2021-2026) & (Kilotons)

Table 56. World Coal-based Biodegradable Plastic Production by Product Form (2027-2032) & (Kilotons)

Table 57. World Coal-based Biodegradable Plastic Production Value by Product Form (2021-2026) & (USD Million)

Table 58. World Coal-based Biodegradable Plastic Production Value by Product Form (2027-2032) & (USD Million)

Table 59. World Coal-based Biodegradable Plastic Average Price by Product Form (2021-2026) & (US\$/Ton)

Table 60. World Coal-based Biodegradable Plastic Average Price by Product Form (2027-2032) & (US\$/Ton)

Table 61. World Coal-based Biodegradable Plastic Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Coal-based Biodegradable Plastic Production by Application (2021-2026) & (Kilotons)

Table 63. World Coal-based Biodegradable Plastic Production by Application (2027-2032) & (Kilotons)

Table 64. World Coal-based Biodegradable Plastic Production Value by Application (2021-2026) & (USD Million)

Table 65. World Coal-based Biodegradable Plastic Production Value by Application (2027-2032) & (USD Million)

Table 66. World Coal-based Biodegradable Plastic Average Price by Application (2021-2026) & (US\$/Ton)

Table 67. World Coal-based Biodegradable Plastic Average Price by Application (2027-2032) & (US\$/Ton)

Table 68. China Energy Investment Corporation Basic Information, Manufacturing Base and Competitors

Table 69. China Energy Investment Corporation Major Business

Table 70. China Energy Investment Corporation Coal-based Biodegradable Plastic Product and Services

Table 71. China Energy Investment Corporation Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. China Energy Investment Corporation Recent Developments/Updates

Table 73. China Energy Investment Corporation Competitive Strengths & Weaknesses

Table 74. Xinjiang Lanshan Tunhe Technology Basic Information, Manufacturing Base and Competitors

Table 75. Xinjiang Lanshan Tunhe Technology Major Business

Table 76. Xinjiang Lanshan Tunhe Technology Coal-based Biodegradable Plastic Product and Services

Table 77. Xinjiang Lanshan Tunhe Technology Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Xinjiang Lanshan Tunhe Technology Recent Developments/Updates

Table 79. Xinjiang Lanshan Tunhe Technology Competitive Strengths & Weaknesses

Table 80. Anhui Haoyuan Chemical Group Basic Information, Manufacturing Base and Competitors

Table 81. Anhui Haoyuan Chemical Group Major Business

Table 82. Anhui Haoyuan Chemical Group Coal-based Biodegradable Plastic Product and Services

Table 83. Anhui Haoyuan Chemical Group Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Anhui Haoyuan Chemical Group Recent Developments/Updates

Table 85. Anhui Haoyuan Chemical Group Competitive Strengths & Weaknesses

Table 86. Shanghai Pujing Chemical Basic Information, Manufacturing Base and Competitors

Table 87. Shanghai Pujing Chemical Major Business

Table 88. Shanghai Pujing Chemical Coal-based Biodegradable Plastic Product and Services

Table 89. Shanghai Pujing Chemical Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. Shanghai Pujing Chemical Recent Developments/Updates

Table 91. Shanghai Pujing Chemical Competitive Strengths & Weaknesses

Table 92. China National Chemical Engineering Group Basic Information, Manufacturing Base and Competitors

Table 93. China National Chemical Engineering Group Major Business

Table 94. China National Chemical Engineering Group Coal-based Biodegradable Plastic Product and Services

Table 95. China National Chemical Engineering Group Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. China National Chemical Engineering Group Recent Developments/Updates

Table 97. China National Chemical Engineering Group Competitive Strengths & Weaknesses

Table 98. Shanxi Jinhui Energy Group Basic Information, Manufacturing Base and Competitors

Table 99. Shanxi Jinhui Energy Group Major Business

Table 100. Shanxi Jinhui Energy Group Coal-based Biodegradable Plastic Product and Services

Table 101. Shanxi Jinhui Energy Group Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Shanxi Jinhui Energy Group Recent Developments/Updates

Table 103. Shanxi Jinhui Energy Group Competitive Strengths & Weaknesses

Table 104. Hubei Yihua Group Basic Information, Manufacturing Base and Competitors

Table 105. Hubei Yihua Group Major Business

Table 106. Hubei Yihua Group Coal-based Biodegradable Plastic Product and Services

Table 107. Hubei Yihua Group Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Hubei Yihua Group Recent Developments/Updates

Table 109. Hubei Yihua Group Competitive Strengths & Weaknesses

Table 110. Kureha Corporation Basic Information, Manufacturing Base and Competitors

Table 111. Kureha Corporation Major Business

Table 112. Kureha Corporation Coal-based Biodegradable Plastic Product and Services

Table 113. Kureha Corporation Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Kureha Corporation Recent Developments/Updates

Table 115. Kureha Corporation Competitive Strengths & Weaknesses

Table 116. BASF Basic Information, Manufacturing Base and Competitors

Table 117. BASF Major Business

Table 118. BASF Coal-based Biodegradable Plastic Product and Services

Table 119. BASF Coal-based Biodegradable Plastic Production (Kilotons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. BASF Recent Developments/Updates

Table 121. BASF Competitive Strengths & Weaknesses

Table 122. Global Key Players of Coal-based Biodegradable Plastic Upstream (Raw Materials)

Table 123. Global Coal-based Biodegradable Plastic Typical Customers

Table 124. Coal-based Biodegradable Plastic Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Coal-based Biodegradable Plastic Picture

Figure 2. World Coal-based Biodegradable Plastic Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Coal-based Biodegradable Plastic Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Coal-based Biodegradable Plastic Production (2021-2032) & (Kilotons)

Figure 5. World Coal-based Biodegradable Plastic Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Coal-based Biodegradable Plastic Production Value Market Share by Region (2021-2032)

Figure 7. World Coal-based Biodegradable Plastic Production Market Share by Region (2021-2032)

Figure 8. North America Coal-based Biodegradable Plastic Production (2021-2032) & (Kilotons)

Figure 9. Europe Coal-based Biodegradable Plastic Production (2021-2032) & (Kilotons)

Figure 10. China Coal-based Biodegradable Plastic Production (2021-2032) & (Kilotons)

Figure 11. Japan Coal-based Biodegradable Plastic Production (2021-2032) & (Kilotons)

Figure 12. Coal-based Biodegradable Plastic Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 15. World Coal-based Biodegradable Plastic Consumption Market Share by Region (2021-2032)

Figure 16. United States Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 17. China Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 18. Europe Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 19. Japan Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 20. South Korea Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 21. ASEAN Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 22. India Coal-based Biodegradable Plastic Consumption (2021-2032) & (Kilotons)

Figure 23. Producer Shipments of Coal-based Biodegradable Plastic by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Coal-based Biodegradable Plastic Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Coal-based Biodegradable Plastic Markets in 2025

Figure 26. United States VS China: Coal-based Biodegradable Plastic Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Coal-based Biodegradable Plastic Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Coal-based Biodegradable Plastic Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Coal-based Biodegradable Plastic Production Market Share 2025

Figure 30. China Based Manufacturers Coal-based Biodegradable Plastic Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Coal-based Biodegradable Plastic Production Market Share 2025

Figure 32. World Coal-based Biodegradable Plastic Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Coal-based Biodegradable Plastic Production Value Market Share by Type in 2025

Figure 34. Coal-based PGA

Figure 35. Coal-based PBAT

Figure 36. Coal-based PBS and PBSA

Figure 37. Others

Figure 38. World Coal-based Biodegradable Plastic Production Market Share by Type (2021-2032)

Figure 39. World Coal-based Biodegradable Plastic Production Value Market Share by Type (2021-2032)

Figure 40. World Coal-based Biodegradable Plastic Average Price by Type (2021-2032) & (US\$/Ton)

Figure 41. World Coal-based Biodegradable Plastic Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Figure 42. World Coal-based Biodegradable Plastic Production Value Market Share by

Product Form in 2025

Figure 43. Coal-to-Syngas Route

Figure 44. Coal-based BDO Route

Figure 45. Coal-based Ethylene Glycol Route

Figure 46. Others

Figure 47. World Coal-based Biodegradable Plastic Production Market Share by Product Form (2021-2032)

Figure 48. World Coal-based Biodegradable Plastic Production Value Market Share by Product Form (2021-2032)

Figure 49. World Coal-based Biodegradable Plastic Average Price by Product Form (2021-2032) & (US\$/Ton)

Figure 50. Biodegradable Resin Pellets

Figure 51. Biodegradable Modified Granules

Figure 52. Others

Figure 53. World Coal-based Biodegradable Plastic Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 54. World Coal-based Biodegradable Plastic Production Value Market Share by Application in 2025

Figure 55. Packaging

Figure 56. Foodservice and Disposable Products

Figure 57. Agriculture

Figure 58. Industrial

Figure 59. Other

Figure 60. World Coal-based Biodegradable Plastic Production Market Share by Application (2021-2032)

Figure 61. World Coal-based Biodegradable Plastic Production Value Market Share by Application (2021-2032)

Figure 62. World Coal-based Biodegradable Plastic Average Price by Application (2021-2032) & (US\$/Ton)

Figure 63. Coal-based Biodegradable Plastic Industry Chain

Figure 64. Coal-based Biodegradable Plastic Procurement Model

Figure 65. Coal-based Biodegradable Plastic Sales Model

Figure 66. Coal-based Biodegradable Plastic Sales Channels, Direct Sales, and Distribution

Figure 67. Methodology

Figure 68. Research Process and Data Source

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