

# Global Fossil-based Biodegradable Plastic Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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## Abstracts

According to our (Global Info Research) latest study, the global Fossil-based Biodegradable Plastic market size was valued at US\$ 2137 million in 2025 and is forecast to a readjusted size of US\$ 3554 million by 2032 with a CAGR of 7.4% during review period.

Fossil-based Biodegradable Plastic refers to biodegradable polymer materials produced from petrochemical or coal chemical monomers such as dicarboxylic acids, diols, lactones and glycolate esters, and further processed through polymerization, copolymerization or compounding. The main product scope includes PBAT, PBS/PBSA, PCL, PGA and related biodegradable compound materials. Although these materials are not primarily bio-based in feedstock origin, they can degrade under industrial composting, soil, hydrolysis or specific environmental conditions, and are mainly used in packaging films and bags, disposable foodservice packaging, agricultural mulch films, injection-molded products, daily-use products, oilfield temporary plugging materials and other industrial or specialty applications. Upstream raw materials mainly include adipic acid, terephthalic acid, succinic acid, 1,4-butanediol, caprolactone, glycolate esters, ethylene glycol, catalysts, chain extenders, fillers and functional additives. Major downstream customers include biodegradable material compounders, packaging product manufacturers, agricultural film producers, foodservice packaging companies, injection molding companies, oilfield chemical companies and end-brand customers. On an ex-factory price basis, global Fossil-based Biodegradable Plastic effective capacity in 2025 is estimated at about 2,250,000 tons, while global sales volume is estimated at about 824,600 tons, with an average ex-factory price of about USD 2,520 per ton. PBAT and its compound materials account for the majority of shipment volume, while PBS/PBSA, PCL and PGA are more focused on specific performance requirements or

higher-value applications. The average industry gross margin is estimated at about 10%–24% in 2025, with relatively lower margins in general packaging and film-grade materials due to competition, low operating rates and raw material price fluctuations, and relatively higher margins in PCL, PGA, high-performance PBS and specialty industrial applications.

The global Fossil-based Biodegradable Plastic market has developed a product structure led by PBAT, with PBS/PBSA, PCL, PGA and related compound materials serving as complementary segments. Applications are mainly concentrated in packaging films, shopping bags, garbage bags, disposable foodservice packaging, agricultural mulch films, injection-molded products and selected industrial specialty materials. Compared with bio-based biodegradable materials such as PLA and PHA, fossil-based biodegradable plastics generally offer better processing compatibility, stronger flexibility and impact resistance, and more mature industrialization experience. PBAT, in particular, is highly suitable for flexible films and bag applications. However, due to rapid capacity expansion in some regions, the industry still faces low operating rates, price competition and product homogenization, putting pressure on profitability in general packaging-grade materials. Future market growth will mainly benefit from the continued implementation of biodegradable material policies, plastic substitution demand in packaging and agriculture, and end customers' emphasis on stable material performance and processing convenience. PBAT and its compounds will remain the main volume contributor, mainly used in films, bags, disposable packaging and agricultural films. PBS/PBSA, supported by good heat resistance and processing performance, is expected to expand in foodservice packaging, injection-molded products and composite materials. PCL and PGA have smaller shipment volumes, but they offer higher added value in medical materials, specialty industrial applications, high-barrier packaging, oilfield temporary plugging and high-performance compound systems. As blending, filling modification, degradation control and downstream processing technologies continue to mature, the application scope of fossil-based biodegradable plastics will further expand. Key market drivers include environmental regulations, plastic restriction policies, sustainable packaging demand from brand owners, pressure to address agricultural film waste, and the need to replace conventional plastics in selected applications. For downstream customers, fossil-based biodegradable plastics have relatively good compatibility with existing extrusion, blown film, cast film, injection molding and thermoforming equipment, which helps reduce process adjustment costs during material substitution. For producers, PBAT, PBS, PGA and related products can extend the petrochemical and coal chemical value chains and increase the added value of upstream monomers such as BDO, adipic acid, succinic acid, terephthalic acid, caprolactone and glycolate esters. Companies with stable raw

material supply, large-scale polymerization capability, formulation development capability and end-customer qualification will be better positioned in future competition. The main market barriers include uneven downstream demand, excess capacity in general-purpose products, costs that remain higher than conventional plastics, and competition from PLA, PHA, paper-based materials, recycled plastics and plastic reduction solutions. Although some fossil-based biodegradable plastics have biodegradable or compostable properties, their feedstocks are not bio-based, which may create challenges in carbon footprint positioning, brand communication and acceptance in overseas markets. At the same time, certification requirements for biodegradability, compostability and soil degradation vary across countries and regions, requiring continuous investment in testing, certification and application validation. Overall, the Fossil-based Biodegradable Plastic market is expected to maintain steady growth, while competition will shift from capacity expansion alone toward cost control, material modification, certification compliance, application development and customer service capability.

This report is a detailed and comprehensive analysis for global Fossil-based Biodegradable Plastic 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 Fossil-based Biodegradable Plastic market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fossil-based Biodegradable Plastic market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fossil-based Biodegradable Plastic market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fossil-based Biodegradable Plastic market shares of main players, shipments in

revenue (\$ Million), sales quantity (Kilotons), 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 Fossil-based Biodegradable Plastic

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 Fossil-based Biodegradable Plastic 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 BASF, Versalis, Kureha Corporation, Daicel Corporation, Wanhua Chemical Group, Kingfa Sci. & Tech., Xinjiang Lanshan Tunhe Technology, China Energy Investment Corporation, Anhui Haoyuan Chemical Group, Shandong Dawn Polymer, etc.

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

## Market Segmentation

Fossil-based Biodegradable Plastic 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.

## Market segment by Type

PBAT

PBS and PBSA

PCL

PGA

Others

#### Market segment by Feedstock Route

Petrochemical-based Route

Coal Chemical-based Route

Others

#### Market segment by Product Form

Resin Pellets

Modified Granules

Others

#### Market segment by Application

Packaging Films and Bags

Disposable Tableware and Food Packaging

Agricultural Mulch Films

Injection Molding and Daily-Use Products

Other

#### Major players covered

BASF

Versalis

Kureha Corporation

Daicel Corporation

Wanhua Chemical Group

Kingfa Sci. & Tech.

Xinjiang Lanshan Tunhe Technology

China Energy Investment Corporation

Anhui Haoyuan Chemical Group

Shandong Dawn Polymer

Zhejiang Hisun Biomaterials

SK Chemicals

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Fossil-based Biodegradable Plastic product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Fossil-based Biodegradable Plastic, with price, sales quantity, revenue, and global market share of Fossil-based Biodegradable Plastic from 2021 to 2026.

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

Chapter 4, the Fossil-based Biodegradable Plastic 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 Fossil-based Biodegradable Plastic 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 Fossil-based Biodegradable Plastic.

Chapter 14 and 15, to describe Fossil-based Biodegradable Plastic sales channel, distributors, customers, research findings and conclusion.

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