

Global Soil-Biodegradable Agricultural Mulch Films Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Soil-Biodegradable Agricultural Mulch Films market size is expected to reach \$ 133 million by 2032, rising at a market growth of 7.3% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of soil-biodegradable agricultural mulch films was approximately 20,500 t, with an average price of about US\$3,900/t. Soil-biodegradable agricultural mulch films are functional agricultural films made primarily from blends of PBAT, PLA, PBS, PHA, starch-based materials, and other biodegradable polymers through blown-film extrusion, cast-film processing, or multilayer co-extrusion. During the crop-growing period, these films help regulate soil temperature, retain moisture, suppress weeds, reduce soil-water evaporation, and improve the root-zone environment. Their formulations, thicknesses, and film structures are engineered to match the required mechanical strength and effective service life of different crops and climatic conditions. After completing their intended agronomic function, the films can be tilled directly into the soil and gradually converted by soil microorganisms into carbon dioxide, water, and biomass, helping address the collection difficulty, residual-film pollution, and soil accumulation associated with conventional agricultural mulch films.

The soil-biodegradable agricultural mulch film market is primarily driven by the need to reduce residual pollution from conventional polyethylene mulch films. Conventional films can fragment and remain in agricultural soil after use, potentially affecting soil structure, crop-root development, and mechanical farming operations. Their collection is often labor-intensive and inefficient, particularly when film fragments are mixed with soil and crop residues. Soil-biodegradable mulch films can be tilled into the soil after completing their agronomic function, reducing the need for post-harvest collection and creating a strong substitution opportunity in regions with severe residual-film pollution, large

planting areas, or high labor costs.

Government policies, agricultural demonstration programs, and public procurement remain major catalysts for market expansion. China continues to promote scientific mulch-film use, recovery programs, and biodegradable-film demonstration projects, while Europe, Japan, and South Korea support adoption through environmental policies, certification systems, and agricultural incentives. Public projects create direct demand, reduce the initial cost burden for growers, and generate field-performance data across different crops, climates, and soil conditions, supporting broader commercial adoption.

The development of standards and certification systems is also improving market credibility and product quality. Standards such as EN 17033, ISO 23517, and GB/T 35795 establish requirements for biodegradation, mechanical performance, ecotoxicity, and agronomic service life. These standards help distinguish genuine soil-biodegradable films from oxo-degradable, photo-degradable, and additive-based polyethylene products. Although certification increases testing and development costs, it strengthens grower confidence and favors manufacturers with proven formulation, production, and field-validation capabilities.

Growing demand from high-value crops and large-scale farming operations provides an important commercial growth base. Vegetables, fruits, tobacco, potatoes, peanuts, cotton, and other cash crops require effective soil warming, moisture retention, weed suppression, and crop-cycle management. These applications are generally more capable of absorbing the price premium of biodegradable films. As commercial farms, agricultural cooperatives, and protected-cultivation operators expand, customers are placing greater value on labor savings, efficient film laying, and lower post-harvest collection costs.

Capacity expansion in biodegradable polymers and improvements in film-conversion technology are gradually enhancing product economics and performance. Greater availability of PBAT, PLA, PBS, PHA, starch-based materials, and biodegradable compounds can reduce raw-material constraints and price volatility. Advances in polymer blending, multilayer co-extrusion, film downgauging, weather resistance, and degradation-rate control are improving tensile strength, mechanical-laying performance, and service-life consistency. Crop-specific and climate-specific formulations are also helping address premature film failure, insufficient degradation, and unstable field performance.

This report studies the global Soil-Biodegradable Agricultural Mulch Films production,

demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Soil-Biodegradable Agricultural Mulch Films 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 Soil-Biodegradable Agricultural Mulch Films that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Soil-Biodegradable Agricultural Mulch Films total production and demand, 2021-2032, (Tons)

Global Soil-Biodegradable Agricultural Mulch Films total production value, 2021-2032, (USD Million)

Global Soil-Biodegradable Agricultural Mulch Films production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Soil-Biodegradable Agricultural Mulch Films consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Soil-Biodegradable Agricultural Mulch Films domestic production, consumption, key domestic manufacturers and share

Global Soil-Biodegradable Agricultural Mulch Films production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Soil-Biodegradable Agricultural Mulch Films production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Soil-Biodegradable Agricultural Mulch Films production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Soil-Biodegradable Agricultural Mulch Films 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 Agriplast S.p.A., Guarniflon S.p.A., Armando Alvarez Group, Polivouga Indústria de Plásticos, S.A., OPACKGROUP, Barbier Group, Raviplast S.r.l., Versalis S.p.A., PolyExpert Inc., Australian Bio-Plastics Pty Ltd., 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 Soil-Biodegradable Agricultural Mulch Films market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) 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 Soil-Biodegradable Agricultural Mulch Films Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Soil-Biodegradable Agricultural Mulch Films Market, Segmentation by Type:

Up to 60 Days

61 to 90 Days

91 to 120 Days

More Than 120 Days

Global Soil-Biodegradable Agricultural Mulch Films Market, Segmentation by Optical Appearance:

Black Films

Transparent Films

Reflective Films

Other

Global Soil-Biodegradable Agricultural Mulch Films Market, Segmentation by Hole Configuration:

Non-Perforated Films

Pre-Perforated Films

Global Soil-Biodegradable Agricultural Mulch Films Market, Segmentation by Application:

Vegetable Crops

Fruit Crops

Field Crops

Other

Companies Profiled:

Agriplast S.p.A.

Guarniflon S.p.A.

Armando Alvarez Group

Polivouga Indústria de Plásticos, S.A.

OPACKGROUP

Barbier Group

Raviplast S.r.l.

Versalis S.p.A.

PolyExpert Inc.

Australian Bio-Plastics Pty Ltd.

Achilles Corporation

Iwatani Materials Corporation

Okura Industrial Co., Ltd.

Sunplac Corporation

MKV Advance Co., Ltd.

C.I. TAKIRON Corporation

UNIC Co., Ltd.

KONNO Co., Ltd

Samdong Industrial Co., Ltd.

TAEKWANG NEW TEC. CO., LTD.

Geumseong Film Co., Ltd.

ASATECH Co., Ltd.

Greendot Biopak Pvt. Ltd.

Tilak Polypack Pvt. Ltd.

Growflex Polyfilms LLP

Kae Hwa Industrial Co., Ltd.

Hangzhou Xinguang Suliao Youxian Gongsi ? Pinyin fallback

Kelun Plastics Group Co., Ltd.

Shandong Qingtian Sugong Youxian Gongsi ? Pinyin fallback

Shandong Tianye Biodegradable New Material Technology Co., Ltd.

Yuxi Shi Xuri Suliao Youxian Zeren Gongsi ? Pinyin fallback

Henan Tichon Biotechnology Co., Ltd.

Henan Qingyuan Tianren Biotechnology Co., Ltd.

Henan Sheng Yinfeng Suliao Youxian Gongsi ? Pinyin fallback

Hubei Guanghe Shengwu Keji Youxian Gongsi ? Pinyin fallback

Baoding Maohua Suliao Zhipin Youxian Gongsi ? Pinyin fallback

Suzhou Zhongdahang Cailiao Keji Youxian Gongsi ? Pinyin fallback

Qingdao Haiyi Plastic Industry Co., Ltd.

Emin Bailiji Shengwu Cailiao Keji Youxian Gongsi ? Pinyin fallback

Ningxia Runyu Suye Youxian Gongsi ? Pinyin fallback

Fujian Yangzhu New Material Technology Co., Ltd.

Hubei Benxing Bio-New Material Co., Ltd.

Wuhan Runtu Biotechnology Co., Ltd.

Shandong Huaxin Lvsu Huanbao Keji Youxian Gongsi ? Pinyin fallback

Zhejiang Jialeimi Horticultural Technology Co., Ltd.

Shanghai Dajue Baozhuang Zhipin Youxian Gongsi ? Pinyin fallback

Shanxi Huayang New Material Co., Ltd.

Shanghai Changfa Xincailiao Youxian Gongsi ? Pinyin fallback

Xiaogan Yisheng Xincailiao Youxian Gongsi ? Pinyin fallback

Hubei Xinfeng Shengtai Keji Youxian Gongsi ? Pinyin fallback

Wuhan Huali Huanbao Chanye Youxian Gongsi ? Pinyin fallback

Judi Xincailiao Neimenggu Youxian Gongsi ? Pinyin fallback

Inner Mongolia Jinkefa New Material Technology Co., Ltd.

Puyang Shi Sijiqing Suliao Zhipin Youxian Gongsi ? Pinyin fallback

Nanyang Shi Baligang Xincailiao Youxian Gongsi ? Pinyin fallback

Key Questions Answered:

1. How big is the global Soil-Biodegradable Agricultural Mulch Films market?
2. What is the demand of the global Soil-Biodegradable Agricultural Mulch Films market?
3. What is the year over year growth of the global Soil-Biodegradable Agricultural Mulch Films market?
4. What is the production and production value of the global Soil-Biodegradable Agricultural Mulch Films market?

5. Who are the key producers in the global Soil-Biodegradable Agricultural Mulch Films market?
6. What are the growth factors driving the market demand?

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