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Polyester Polyol From Bio-Succinic Acid Market Size, Share & Trends Analysis Report By Product (Aliphatic Polyester Polyol, Aromatic Polyester Polyol), By Application (Polyurethane (Flexible Foam, Rigid Foam, Coatings, Adhesives & Sealants)), By Region, And Segment Forecasts, 2025 - 2033

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Abstracts

The global polyester polyol from bio-succinic acid market size was estimated at USD 183.5 million in 2024 and is projected to reach USD 386.8 million by 2033, growing at a CAGR of 14.9% from 2025 to 2033. The growth is primarily driven by the increasing demand for sustainable and eco-friendly materials across various industries.

The shift toward renewable feedstocks, such as bio-succinic acid, aligns with global initiatives to reduce carbon footprints and dependence on fossil fuels. Additionally, advancements in biotechnological processes have enhanced the efficiency and cost-effectiveness of producing bio-based polyols, further accelerating market adoption. The increasing emphasis on sustainability and the use of bio-based raw materials is accelerating the shift toward renewable intermediates in the production of polyurethanes. Linear polyester polyols made entirely from renewable sources can be synthesized with bio-succinic acid, bio-sebacic acid, bio-1,3-propane diol, and bio-1,4-butane diol. Succinic acid, which is generated through the fermentation of sugars derived from corn, acts as a crucial aliphatic diacid in the polyol structure, delivering enhanced performance and environmental advantages. These bio-derived polyester polyols are particularly suitable for creating polyurethane elastomers, especially when bio-1,4-butanediol is used as a chain extender.

One of the major restraints hindering the widespread adoption of bio-succinic acid-

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based polyester polyols is their technical and performance limitations, particularly in demanding polyurethane applications. These polyols often exhibit inferior mechanical and thermal properties, especially in rigid applications such as insulation foams and structural components. According to a study published in Polymer Testing (2020) have shown that rigid foams made from succinic acid-derived polyols can display 10-15% lower compressive strength compared to traditional aromatic polyester polyols derived from phthalic anhydride, limiting their suitability for high-load or thermally intense environments.

According to the Directive 2010/75/EU of the European Parliament and of the Council on Industrial Emissions (recast), commonly known as the Industrial Emissions Directive (IED), serves as a foundational regulatory framework to minimize the environmental impact of industrial activities across the European Union. It integrates and streamlines seven earlier directives, including the Integrated Pollution Prevention and Control (IPPC) Directive, to ensure high protection for human health and the environment.

Global Polyester Polyol From Bio-Succinic Acid Market Report Segmentation

This report forecasts volume & revenue growth at global, regional, and country levels and provides an analysis of the latest industry trends in each of the sub-segments from 2018 to 2033. For this study, Grand View Research has segmented the global polyester polyol from bio-succinic acid market report based on product, application, and region:

Product Outlook (Volume, Kilotons; Revenue, USD Million, 2018 - 2033)

Aliphatic Polyester Polyol

Aromatic Polyester Polyol

Others

Application Outlook (Volume, Kilotons; Revenue, USD Million, 2018 - 2033)

Polyurethane

Flexible Foam

Rigid Foam

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Latin America

Brazil

Argentina

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CHAPTER 7. COMPETITIVE LANDSCAPE

CHAPTER 8. COMPANY LISTING (OVERVIEW, FINANCIAL PERFORMANCE, PRODUCTS OVERVIEW)

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