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Global Bio Based Ethylene Market Growth 2026-2032

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Abstracts

The global Bio Based Ethylene market size is predicted to grow from US$ 262 million in 2025 to US$ 384 million in 2032; it is expected to grow at a CAGR of 5.7% from 2026 to 2032.

Bio-Based Ethylene is ethylene whose carbon originates partly or wholly from renewable feedstocks while remaining chemically identical to fossil ethylene; it functions as a drop-in C2 building block for polyethylene, ethylene oxide/glycols, vinyls, styrenics and alpha-olefins with auditable renewable attribution. Two chain-of-custody modes dominate. First, physical segregation via bio-ethanol dehydration yields neat bio-ethylene (e.g., Braskem's Triunfo green ethylene), directly supporting bio-PE with measurable biogenic carbon. Second, mass balance at naphtha crackers attributes renewable content from bio-naphtha or bio-circular oils to ethylene and downstream polymers under ISCC PLUS, which sets site- and scope-specific bookkeeping rules for attribution and traceability. These frameworks explicitly cover Naphtha ? Ethylene within certified product groups, allowing certified transfers through the cracker-to-polymer chain.

Upstream supply combines a large segregated line with multiple ISCC-certified cracker networks. Braskem expanded its Triunfo bio-ethylene capacity from 200 kt/y to 260 kt/y (July 2023) and subsequently reported operation rates above nameplate (May 2025), while independent OPIS/WSJ coverage documented a flood-related outage and restart in May 2024—together validating scale and continuity. In Europe and North America, SABIC offers certified renewable polymers produced from bio-naphtha via ISCC PLUS; TotalEnergies states all European polymer grades are available as RE:newable (ISCC PLUS bio/bio-circular feedstock); Borealis markets Bornewables across the ethylene chain, including PEX via mass balance; INEOS demonstrates bio-based HDPE projects tied to tall-oil-derived feedstock and bio-ethylene at Cologne feeding Lillo polymerization; LyondellBasell extends CirculenRenew under ISCC PLUS; Repsol and

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Versalis offer bio- and bio-circular attributed olefins/polyolefins within certified Balance®/Reciclex programs. Dow integrates UPM BioVerno renewable naphtha at Terneuzen. Site-scope ISCC certifications at Formosa Plastics USA and Westlake underline North American cracker/polymer readiness for attributed chains.

In the current market, global production is around 230,000 tonnes, with an average selling price of about 1,100 USD/t on an EXW basis. Concentration is structurally higher in segregated ethanol routes—Braskem supplies the bulk of directly observable bio-ethylene—while mass balance extends geographic reach through certified crackers, diffusing concentration once attributed volumes are included. Demand is anchored in polyethylene (near one-to-one incorporation to polymer), with additional pull from ethylene oxide/glycols (e.g., bio-MEG chains) and selective vinyls and styrenics allocations where certification supports claims. For 2025–2031, directional growth is supported by corporate decarbonization targets, brand procurement frameworks and broader ISCC PLUS adoption; bottlenecks include renewable feedstock availability, site-scope certification coverage, and the bio-naphtha premium vs. fossil naphtha. As with downstream PE, ISCC PLUS remains the dominant chain-of-custody mechanism, and ISO 16620-2 / ASTM D6866 radiocarbon methods underpin claims where physical segregation is used.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Bio Based Ethylene Industry Forecast” looks at past sales and reviews total world Bio Based Ethylene sales in 2025, providing a comprehensive analysis by region and market sector of projected Bio Based Ethylene sales for 2026 through 2032. With Bio Based Ethylene sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Bio Based Ethylene industry.

This Insight Report provides a comprehensive analysis of the global Bio Based Ethylene landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Bio Based Ethylene portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Bio Based Ethylene market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Bio Based Ethylene and breaks down the forecast by

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Source Route, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Bio Based Ethylene.

This report presents a comprehensive overview, market shares, and growth opportunities of Bio Based Ethylene market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Source Route:

Ethanol-to-Ethylene

Bio-Attributed (Mass Balance)

Bio-Circular (Mass Balance)

Segmentation by Certification:

ISCC PLUS

Other Recognized Schemes

Segmentation by Grade:

Polymer-Grade Ethylene

EO-Grade Ethylene

Segmentation by Application:

Polyethylene

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- Ethylene Oxide and Glycols
- Vinyls Chain
- Styrenics
- Alpha-Olefins and Derivatives
- Others

This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe

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- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

- Braskem
- SABIC
- INEOS Olefins & Polymers
- Borealis
- TotalEnergies Polymers
- LyondellBasell

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Repsol

Versalis

Dow

Prime Polymer

Formosa Plastics USA

Westlake

LG Chem

Reliance Industries

India Glycols

Sinopec

Key Questions Addressed in this Report

What is the 10-year outlook for the global Bio Based Ethylene market?

What factors are driving Bio Based Ethylene market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Bio Based Ethylene market opportunities vary by end market size?

How does Bio Based Ethylene break out by Source Route, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Bio Based Ethylene Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Bio Based Ethylene by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Bio Based Ethylene by Country/Region, 2021, 2025 & 2032
2.2 Bio Based Ethylene Segment by Source Route
  2.2.1 Ethanol-to-Ethylene
  2.2.2 Bio-Attributed (Mass Balance)
  2.2.3 Bio-Circular (Mass Balance)
  2.2.4 Bio Based Ethylene Sales by Source Route
    2.2.4.1 Global Bio Based Ethylene Sales Market Share by Source Route (2021-2026)
    2.2.4.2 Global Bio Based Ethylene Revenue and Market Share by Source Route (2021-2026)
    2.2.4.3 Global Bio Based Ethylene Sale Price by Source Route (2021-2026)
2.3 Bio Based Ethylene Segment by Certification
  2.3.1 ISCC PLUS
  2.3.2 Other Recognized Schemes
  2.3.3 Bio Based Ethylene Sales by Certification
    2.3.3.1 Global Bio Based Ethylene Sales Market Share by Certification (2021-2026)
    2.3.3.2 Global Bio Based Ethylene Revenue and Market Share by Certification (2021-2026)
    2.3.3.3 Global Bio Based Ethylene Sale Price by Certification (2021-2026)
2.4 Bio Based Ethylene Segment by Grade

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2.4.1 Polymer-Grade Ethylene
2.4.2 EO-Grade Ethylene
2.4.3 Bio Based Ethylene Sales by Grade
2.4.3.1 Global Bio Based Ethylene Sales Market Share by Grade (2021-2026)
2.4.3.2 Global Bio Based Ethylene Revenue and Market Share by Grade (2021-2026)
2.4.3.3 Global Bio Based Ethylene Sale Price by Grade (2021-2026)
2.5 Bio Based Ethylene Segment by Application
2.5.1 Polyethylene
2.5.2 Ethylene Oxide and Glycols
2.5.3 Vinyls Chain
2.5.4 Styrenics
2.5.5 Alpha-Olefins and Derivatives
2.5.6 Others
2.5.7 Bio Based Ethylene Sales by Application
2.5.7.1 Global Bio Based Ethylene Sale Market Share by Application (2021-2026)
2.5.7.2 Global Bio Based Ethylene Revenue and Market Share by Application (2021-2026)
2.5.7.3 Global Bio Based Ethylene Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Bio Based Ethylene Breakdown Data by Company
3.1.1 Global Bio Based Ethylene Annual Sales by Company (2021-2026)
3.1.2 Global Bio Based Ethylene Sales Market Share by Company (2021-2026)
3.2 Global Bio Based Ethylene Annual Revenue by Company (2021-2026)
3.2.1 Global Bio Based Ethylene Revenue by Company (2021-2026)
3.2.2 Global Bio Based Ethylene Revenue Market Share by Company (2021-2026)
3.3 Global Bio Based Ethylene Sale Price by Company
3.4 Key Manufacturers Bio Based Ethylene Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers Bio Based Ethylene Product Location Distribution
3.4.2 Players Bio Based Ethylene Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR BIO BASED ETHYLENE BY GEOGRAPHIC

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REGION

4.1 World Historic Bio Based Ethylene Market Size by Geographic Region (2021-2026)
4.1.1 Global Bio Based Ethylene Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Bio Based Ethylene Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Bio Based Ethylene Market Size by Country/Region (2021-2026)
4.2.1 Global Bio Based Ethylene Annual Sales by Country/Region (2021-2026)
4.2.2 Global Bio Based Ethylene Annual Revenue by Country/Region (2021-2026)
4.3 Americas Bio Based Ethylene Sales Growth
4.4 APAC Bio Based Ethylene Sales Growth
4.5 Europe Bio Based Ethylene Sales Growth
4.6 Middle East & Africa Bio Based Ethylene Sales Growth

5 AMERICAS

5.1 Americas Bio Based Ethylene Sales by Country
5.1.1 Americas Bio Based Ethylene Sales by Country (2021-2026)
5.1.2 Americas Bio Based Ethylene Revenue by Country (2021-2026)
5.2 Americas Bio Based Ethylene Sales by Source Route (2021-2026)
5.3 Americas Bio Based Ethylene Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Bio Based Ethylene Sales by Region
6.1.1 APAC Bio Based Ethylene Sales by Region (2021-2026)
6.1.2 APAC Bio Based Ethylene Revenue by Region (2021-2026)
6.2 APAC Bio Based Ethylene Sales by Source Route (2021-2026)
6.3 APAC Bio Based Ethylene Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

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7 EUROPE

7.1 Europe Bio Based Ethylene by Country
  7.1.1 Europe Bio Based Ethylene Sales by Country (2021-2026)
  7.1.2 Europe Bio Based Ethylene Revenue by Country (2021-2026)
7.2 Europe Bio Based Ethylene Sales by Source Route (2021-2026)
7.3 Europe Bio Based Ethylene Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Bio Based Ethylene by Country
  8.1.1 Middle East & Africa Bio Based Ethylene Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Bio Based Ethylene Revenue by Country (2021-2026)
8.2 Middle East & Africa Bio Based Ethylene Sales by Source Route (2021-2026)
8.3 Middle East & Africa Bio Based Ethylene Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Bio Based Ethylene
10.3 Manufacturing Process Analysis of Bio Based Ethylene
10.4 Industry Chain Structure of Bio Based Ethylene

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info@marketpublishers.com

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Bio Based Ethylene Distributors
11.3 Bio Based Ethylene Customer

12 WORLD FORECAST REVIEW FOR BIO BASED ETHYLENE BY GEOGRAPHIC REGION

12.1 Global Bio Based Ethylene Market Size Forecast by Region
  12.1.1 Global Bio Based Ethylene Forecast by Region (2027-2032)
  12.1.2 Global Bio Based Ethylene Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Bio Based Ethylene Forecast by Source Route (2027-2032)
12.7 Global Bio Based Ethylene Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Braskem
  13.1.1 Braskem Company Information
  13.1.2 Braskem Bio Based Ethylene Product Portfolios and Specifications
  13.1.3 Braskem Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 Braskem Main Business Overview
  13.1.5 Braskem Latest Developments
13.2 SABIC
  13.2.1 SABIC Company Information
  13.2.2 SABIC Bio Based Ethylene Product Portfolios and Specifications
  13.2.3 SABIC Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
  13.2.4 SABIC Main Business Overview
  13.2.5 SABIC Latest Developments
13.3 INEOS Olefins & Polymers

+357 96 030922
info@marketpublishers.com

13.3.1 INEOS Olefins & Polymers Company Information
13.3.2 INEOS Olefins & Polymers Bio Based Ethylene Product Portfolios and Specifications
13.3.3 INEOS Olefins & Polymers Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 INEOS Olefins & Polymers Main Business Overview
13.3.5 INEOS Olefins & Polymers Latest Developments
13.4 Borealis
13.4.1 Borealis Company Information
13.4.2 Borealis Bio Based Ethylene Product Portfolios and Specifications
13.4.3 Borealis Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Borealis Main Business Overview
13.4.5 Borealis Latest Developments
13.5 TotalEnergies Polymers
13.5.1 TotalEnergies Polymers Company Information
13.5.2 TotalEnergies Polymers Bio Based Ethylene Product Portfolios and Specifications
13.5.3 TotalEnergies Polymers Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 TotalEnergies Polymers Main Business Overview
13.5.5 TotalEnergies Polymers Latest Developments
13.6 LyondellBasell
13.6.1 LyondellBasell Company Information
13.6.2 LyondellBasell Bio Based Ethylene Product Portfolios and Specifications
13.6.3 LyondellBasell Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 LyondellBasell Main Business Overview
13.6.5 LyondellBasell Latest Developments
13.7 Repsol
13.7.1 Repsol Company Information
13.7.2 Repsol Bio Based Ethylene Product Portfolios and Specifications
13.7.3 Repsol Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Repsol Main Business Overview
13.7.5 Repsol Latest Developments
13.8 Versalis
13.8.1 Versalis Company Information
13.8.2 Versalis Bio Based Ethylene Product Portfolios and Specifications

+357 96 030922
info@marketpublishers.com

13.8.3 Versalis Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Versalis Main Business Overview
13.8.5 Versalis Latest Developments
13.9 Dow
13.9.1 Dow Company Information
13.9.2 Dow Bio Based Ethylene Product Portfolios and Specifications
13.9.3 Dow Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Dow Main Business Overview
13.9.5 Dow Latest Developments
13.10 Prime Polymer
13.10.1 Prime Polymer Company Information
13.10.2 Prime Polymer Bio Based Ethylene Product Portfolios and Specifications
13.10.3 Prime Polymer Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Prime Polymer Main Business Overview
13.10.5 Prime Polymer Latest Developments
13.11 Formosa Plastics USA
13.11.1 Formosa Plastics USA Company Information
13.11.2 Formosa Plastics USA Bio Based Ethylene Product Portfolios and Specifications
13.11.3 Formosa Plastics USA Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Formosa Plastics USA Main Business Overview
13.11.5 Formosa Plastics USA Latest Developments
13.12 Westlake
13.12.1 Westlake Company Information
13.12.2 Westlake Bio Based Ethylene Product Portfolios and Specifications
13.12.3 Westlake Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 Westlake Main Business Overview
13.12.5 Westlake Latest Developments
13.13 LG Chem
13.13.1 LG Chem Company Information
13.13.2 LG Chem Bio Based Ethylene Product Portfolios and Specifications
13.13.3 LG Chem Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 LG Chem Main Business Overview
13.13.5 LG Chem Latest Developments

+357 96 030922
info@marketpublishers.com

13.14 Reliance Industries
13.14.1 Reliance Industries Company Information
13.14.2 Reliance Industries Bio Based Ethylene Product Portfolios and Specifications
13.14.3 Reliance Industries Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 Reliance Industries Main Business Overview
13.14.5 Reliance Industries Latest Developments
13.15 India Glycols
13.15.1 India Glycols Company Information
13.15.2 India Glycols Bio Based Ethylene Product Portfolios and Specifications
13.15.3 India Glycols Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 India Glycols Main Business Overview
13.15.5 India Glycols Latest Developments
13.16 Sinopec
13.16.1 Sinopec Company Information
13.16.2 Sinopec Bio Based Ethylene Product Portfolios and Specifications
13.16.3 Sinopec Bio Based Ethylene Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Sinopec Main Business Overview
13.16.5 Sinopec Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Bio Based Ethylene Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Bio Based Ethylene Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Ethanol-to-Ethylene
Table 4. Major Players of Bio-Attributed (Mass Balance)
Table 5. Major Players of Bio-Circular (Mass Balance)
Table 6. Global Bio Based Ethylene Sales by Source Route (2021-2026) & (Kilotons)
Table 7. Global Bio Based Ethylene Sales Market Share by Source Route (2021-2026)
Table 8. Global Bio Based Ethylene Revenue by Source Route (2021-2026) & ($ million)
Table 9. Global Bio Based Ethylene Revenue Market Share by Source Route (2021-2026)
Table 10. Global Bio Based Ethylene Sale Price by Source Route (2021-2026) & (US$/Ton)
Table 11. Major Players of ISCC PLUS
Table 12. Major Players of Other Recognized Schemes
Table 13. Global Bio Based Ethylene Sales by Certification (2021-2026) & (Kilotons)
Table 14. Global Bio Based Ethylene Sales Market Share by Certification (2021-2026)
Table 15. Global Bio Based Ethylene Revenue by Certification (2021-2026) & ($ million)
Table 16. Global Bio Based Ethylene Revenue Market Share by Certification (2021-2026)
Table 17. Global Bio Based Ethylene Sale Price by Certification (2021-2026) & (US$/Ton)
Table 18. Major Players of Polymer-Grade Ethylene
Table 19. Major Players of EO-Grade Ethylene
Table 20. Global Bio Based Ethylene Sales by Grade (2021-2026) & (Kilotons)
Table 21. Global Bio Based Ethylene Sales Market Share by Grade (2021-2026)
Table 22. Global Bio Based Ethylene Revenue by Grade (2021-2026) & ($ million)
Table 23. Global Bio Based Ethylene Revenue Market Share by Grade (2021-2026)
Table 24. Global Bio Based Ethylene Sale Price by Grade (2021-2026) & (US$/Ton)
Table 25. Global Bio Based Ethylene Sale by Application (2021-2026) & (Kilotons)
Table 26. Global Bio Based Ethylene Sale Market Share by Application (2021-2026)
Table 27. Global Bio Based Ethylene Revenue by Application (2021-2026) & ($ million)
Table 28. Global Bio Based Ethylene Revenue Market Share by Application

+357 96 030922
info@marketpublishers.com

(2021-2026)
Table 29. Global Bio Based Ethylene Sale Price by Application (2021-2026) & (US$/Ton)
Table 30. Global Bio Based Ethylene Sales by Company (2021-2026) & (Kilotons)
Table 31. Global Bio Based Ethylene Sales Market Share by Company (2021-2026)
Table 32. Global Bio Based Ethylene Revenue by Company (2021-2026) & ($ millions)
Table 33. Global Bio Based Ethylene Revenue Market Share by Company (2021-2026)
Table 34. Global Bio Based Ethylene Sale Price by Company (2021-2026) & (US$/Ton)
Table 35. Key Manufacturers Bio Based Ethylene Producing Area Distribution and Sales Area
Table 36. Players Bio Based Ethylene Products Offered
Table 37. Bio Based Ethylene Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 38. New Products and Potential Entrants
Table 39. Market M&A Activity & Strategy
Table 40. Global Bio Based Ethylene Sales by Geographic Region (2021-2026) & (Kilotons)
Table 41. Global Bio Based Ethylene Sales Market Share Geographic Region (2021-2026)
Table 42. Global Bio Based Ethylene Revenue by Geographic Region (2021-2026) & ($ millions)
Table 43. Global Bio Based Ethylene Revenue Market Share by Geographic Region (2021-2026)
Table 44. Global Bio Based Ethylene Sales by Country/Region (2021-2026) & (Kilotons)
Table 45. Global Bio Based Ethylene Sales Market Share by Country/Region (2021-2026)
Table 46. Global Bio Based Ethylene Revenue by Country/Region (2021-2026) & ($ millions)
Table 47. Global Bio Based Ethylene Revenue Market Share by Country/Region (2021-2026)
Table 48. Americas Bio Based Ethylene Sales by Country (2021-2026) & (Kilotons)
Table 49. Americas Bio Based Ethylene Sales Market Share by Country (2021-2026)
Table 50. Americas Bio Based Ethylene Revenue by Country (2021-2026) & ($ millions)
Table 51. Americas Bio Based Ethylene Sales by Source Route (2021-2026) & (Kilotons)
Table 52. Americas Bio Based Ethylene Sales by Application (2021-2026) & (Kilotons)
Table 53. APAC Bio Based Ethylene Sales by Region (2021-2026) & (Kilotons)
Table 54. APAC Bio Based Ethylene Sales Market Share by Region (2021-2026)
Table 55. APAC Bio Based Ethylene Revenue by Region (2021-2026) & ($ millions)

+357 96 030922
info@marketpublishers.com

Table 56. APAC Bio Based Ethylene Sales by Source Route (2021-2026) & (Kilotons)
Table 57. APAC Bio Based Ethylene Sales by Application (2021-2026) & (Kilotons)
Table 58. Europe Bio Based Ethylene Sales by Country (2021-2026) & (Kilotons)
Table 59. Europe Bio Based Ethylene Revenue by Country (2021-2026) & ($ millions)
Table 60. Europe Bio Based Ethylene Sales by Source Route (2021-2026) & (Kilotons)
Table 61. Europe Bio Based Ethylene Sales by Application (2021-2026) & (Kilotons)
Table 62. Middle East & Africa Bio Based Ethylene Sales by Country (2021-2026) & (Kilotons)
Table 63. Middle East & Africa Bio Based Ethylene Revenue Market Share by Country (2021-2026)
Table 64. Middle East & Africa Bio Based Ethylene Sales by Source Route (2021-2026) & (Kilotons)
Table 65. Middle East & Africa Bio Based Ethylene Sales by Application (2021-2026) & (Kilotons)
Table 66. Key Market Drivers & Growth Opportunities of Bio Based Ethylene
Table 67. Key Market Challenges & Risks of Bio Based Ethylene
Table 68. Key Industry Trends of Bio Based Ethylene
Table 69. Bio Based Ethylene Raw Material
Table 70. Key Suppliers of Raw Materials
Table 71. Bio Based Ethylene Distributors List
Table 72. Bio Based Ethylene Customer List
Table 73. Global Bio Based Ethylene Sales Forecast by Region (2027-2032) & (Kilotons)
Table 74. Global Bio Based Ethylene Revenue Forecast by Region (2027-2032) & ($ millions)
Table 75. Americas Bio Based Ethylene Sales Forecast by Country (2027-2032) & (Kilotons)
Table 76. Americas Bio Based Ethylene Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 77. APAC Bio Based Ethylene Sales Forecast by Region (2027-2032) & (Kilotons)
Table 78. APAC Bio Based Ethylene Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 79. Europe Bio Based Ethylene Sales Forecast by Country (2027-2032) & (Kilotons)
Table 80. Europe Bio Based Ethylene Revenue Forecast by Country (2027-2032) & ($ millions)
Table 81. Middle East & Africa Bio Based Ethylene Sales Forecast by Country (2027-2032) & (Kilotons)

+357 96 030922
info@marketpublishers.com

Table 82. Middle East & Africa Bio Based Ethylene Revenue Forecast by Country (2027-2032) & ($ millions)
Table 83. Global Bio Based Ethylene Sales Forecast by Source Route (2027-2032) & (Kilotons)
Table 84. Global Bio Based Ethylene Revenue Forecast by Source Route (2027-2032) & ($ millions)
Table 85. Global Bio Based Ethylene Sales Forecast by Application (2027-2032) & (Kilotons)
Table 86. Global Bio Based Ethylene Revenue Forecast by Application (2027-2032) & ($ millions)
Table 87. Braskem Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 88. Braskem Bio Based Ethylene Product Portfolios and Specifications
Table 89. Braskem Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 90. Braskem Main Business
Table 91. Braskem Latest Developments
Table 92. SABIC Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 93. SABIC Bio Based Ethylene Product Portfolios and Specifications
Table 94. SABIC Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 95. SABIC Main Business
Table 96. SABIC Latest Developments
Table 97. INEOS Olefins & Polymers Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 98. INEOS Olefins & Polymers Bio Based Ethylene Product Portfolios and Specifications
Table 99. INEOS Olefins & Polymers Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 100. INEOS Olefins & Polymers Main Business
Table 101. INEOS Olefins & Polymers Latest Developments
Table 102. Borealis Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 103. Borealis Bio Based Ethylene Product Portfolios and Specifications
Table 104. Borealis Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 105. Borealis Main Business
Table 106. Borealis Latest Developments

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Table 107. TotalEnergies Polymers Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 108. TotalEnergies Polymers Bio Based Ethylene Product Portfolios and Specifications
Table 109. TotalEnergies Polymers Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 110. TotalEnergies Polymers Main Business
Table 111. TotalEnergies Polymers Latest Developments
Table 112. LyondellBasell Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 113. LyondellBasell Bio Based Ethylene Product Portfolios and Specifications
Table 114. LyondellBasell Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 115. LyondellBasell Main Business
Table 116. LyondellBasell Latest Developments
Table 117. Repsol Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 118. Repsol Bio Based Ethylene Product Portfolios and Specifications
Table 119. Repsol Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 120. Repsol Main Business
Table 121. Repsol Latest Developments
Table 122. Versalis Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 123. Versalis Bio Based Ethylene Product Portfolios and Specifications
Table 124. Versalis Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 125. Versalis Main Business
Table 126. Versalis Latest Developments
Table 127. Dow Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 128. Dow Bio Based Ethylene Product Portfolios and Specifications
Table 129. Dow Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 130. Dow Main Business
Table 131. Dow Latest Developments
Table 132. Prime Polymer Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 133. Prime Polymer Bio Based Ethylene Product Portfolios and Specifications

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Table 134. Prime Polymer Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 135. Prime Polymer Main Business
Table 136. Prime Polymer Latest Developments
Table 137. Formosa Plastics USA Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 138. Formosa Plastics USA Bio Based Ethylene Product Portfolios and Specifications
Table 139. Formosa Plastics USA Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 140. Formosa Plastics USA Main Business
Table 141. Formosa Plastics USA Latest Developments
Table 142. Westlake Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 143. Westlake Bio Based Ethylene Product Portfolios and Specifications
Table 144. Westlake Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 145. Westlake Main Business
Table 146. Westlake Latest Developments
Table 147. LG Chem Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 148. LG Chem Bio Based Ethylene Product Portfolios and Specifications
Table 149. LG Chem Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 150. LG Chem Main Business
Table 151. LG Chem Latest Developments
Table 152. Reliance Industries Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 153. Reliance Industries Bio Based Ethylene Product Portfolios and Specifications
Table 154. Reliance Industries Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 155. Reliance Industries Main Business
Table 156. Reliance Industries Latest Developments
Table 157. India Glycols Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 158. India Glycols Bio Based Ethylene Product Portfolios and Specifications
Table 159. India Glycols Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)

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Table 160. India Glycols Main Business
Table 161. India Glycols Latest Developments
Table 162. Sinopec Basic Information, Bio Based Ethylene Manufacturing Base, Sales Area and Its Competitors
Table 163. Sinopec Bio Based Ethylene Product Portfolios and Specifications
Table 164. Sinopec Bio Based Ethylene Sales (Kilotons), Revenue ($ Million), Price (US$/Ton) and Gross Margin (2021-2026)
Table 165. Sinopec Main Business
Table 166. Sinopec Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Bio Based Ethylene
Figure 2. Bio Based Ethylene Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Bio Based Ethylene Sales Growth Rate 2021-2032 (Kilotons)
Figure 7. Global Bio Based Ethylene Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Bio Based Ethylene Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Bio Based Ethylene Sales Market Share by Country/Region (2025)
Figure 10. Bio Based Ethylene Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Ethanol-to-Ethylene
Figure 12. Product Picture of Bio-Attributed (Mass Balance)
Figure 13. Product Picture of Bio-Circular (Mass Balance)
Figure 14. Global Bio Based Ethylene Sales Market Share by Source Route in 2026
Figure 15. Global Bio Based Ethylene Revenue Market Share by Source Route (2021-2026)
Figure 16. Product Picture of ISCC PLUS
Figure 17. Product Picture of Other Recognized Schemes
Figure 18. Global Bio Based Ethylene Sales Market Share by Certification in 2026
Figure 19. Global Bio Based Ethylene Revenue Market Share by Certification (2021-2026)
Figure 20. Product Picture of Polymer-Grade Ethylene
Figure 21. Product Picture of EO-Grade Ethylene
Figure 22. Global Bio Based Ethylene Sales Market Share by Grade in 2026
Figure 23. Global Bio Based Ethylene Revenue Market Share by Grade (2021-2026)
Figure 24. Bio Based Ethylene Consumed in Polyethylene
Figure 25. Global Bio Based Ethylene Market: Polyethylene (2021-2026) & (Kilotons)
Figure 26. Bio Based Ethylene Consumed in Ethylene Oxide and Glycols
Figure 27. Global Bio Based Ethylene Market: Ethylene Oxide and Glycols (2021-2026) & (Kilotons)
Figure 28. Bio Based Ethylene Consumed in Vinyls Chain
Figure 29. Global Bio Based Ethylene Market: Vinyls Chain (2021-2026) & (Kilotons)
Figure 30. Bio Based Ethylene Consumed in Styrenics

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Figure 31. Global Bio Based Ethylene Market: Styrenics (2021-2026) & (Kilotons)
Figure 32. Bio Based Ethylene Consumed in Alpha-Olefins and Derivatives
Figure 33. Global Bio Based Ethylene Market: Alpha-Olefins and Derivatives (2021-2026) & (Kilotons)
Figure 34. Bio Based Ethylene Consumed in Others
Figure 35. Global Bio Based Ethylene Market: Others (2021-2026) & (Kilotons)
Figure 36. Global Bio Based Ethylene Sale Market Share by Application (2025)
Figure 37. Global Bio Based Ethylene Revenue Market Share by Application in 2026
Figure 38. Bio Based Ethylene Sales by Company in 2026 (Kilotons)
Figure 39. Global Bio Based Ethylene Sales Market Share by Company in 2026
Figure 40. Bio Based Ethylene Revenue by Company in 2026 ($ millions)
Figure 41. Global Bio Based Ethylene Revenue Market Share by Company in 2026
Figure 42. Global Bio Based Ethylene Sales Market Share by Geographic Region (2021-2026)
Figure 43. Global Bio Based Ethylene Revenue Market Share by Geographic Region in 2026
Figure 44. Americas Bio Based Ethylene Sales 2021-2026 (Kilotons)
Figure 45. Americas Bio Based Ethylene Revenue 2021-2026 ($ millions)
Figure 46. APAC Bio Based Ethylene Sales 2021-2026 (Kilotons)
Figure 47. APAC Bio Based Ethylene Revenue 2021-2026 ($ millions)
Figure 48. Europe Bio Based Ethylene Sales 2021-2026 (Kilotons)
Figure 49. Europe Bio Based Ethylene Revenue 2021-2026 ($ millions)
Figure 50. Middle East & Africa Bio Based Ethylene Sales 2021-2026 (Kilotons)
Figure 51. Middle East & Africa Bio Based Ethylene Revenue 2021-2026 ($ millions)
Figure 52. Americas Bio Based Ethylene Sales Market Share by Country in 2026
Figure 53. Americas Bio Based Ethylene Revenue Market Share by Country (2021-2026)
Figure 54. Americas Bio Based Ethylene Sales Market Share by Source Route (2021-2026)
Figure 55. Americas Bio Based Ethylene Sales Market Share by Application (2021-2026)
Figure 56. United States Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 57. Canada Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 58. Mexico Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 59. Brazil Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 60. APAC Bio Based Ethylene Sales Market Share by Region in 2026
Figure 61. APAC Bio Based Ethylene Revenue Market Share by Region (2021-2026)
Figure 62. APAC Bio Based Ethylene Sales Market Share by Source Route (2021-2026)

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Figure 63. APAC Bio Based Ethylene Sales Market Share by Application (2021-2026)
Figure 64. China Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 65. Japan Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 66. South Korea Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 67. Southeast Asia Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 68. India Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 69. Australia Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 70. China Taiwan Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 71. Europe Bio Based Ethylene Sales Market Share by Country in 2026
Figure 72. Europe Bio Based Ethylene Revenue Market Share by Country (2021-2026)
Figure 73. Europe Bio Based Ethylene Sales Market Share by Source Route (2021-2026)
Figure 74. Europe Bio Based Ethylene Sales Market Share by Application (2021-2026)
Figure 75. Germany Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 76. France Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 77. UK Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 78. Italy Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 79. Russia Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 80. Middle East & Africa Bio Based Ethylene Sales Market Share by Country (2021-2026)
Figure 81. Middle East & Africa Bio Based Ethylene Sales Market Share by Source Route (2021-2026)
Figure 82. Middle East & Africa Bio Based Ethylene Sales Market Share by Application (2021-2026)
Figure 83. Egypt Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 84. South Africa Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 85. Israel Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 86. Turkey Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 87. GCC Countries Bio Based Ethylene Revenue Growth 2021-2026 ($ millions)
Figure 88. Manufacturing Cost Structure Analysis of Bio Based Ethylene in 2026
Figure 89. Manufacturing Process Analysis of Bio Based Ethylene
Figure 90. Industry Chain Structure of Bio Based Ethylene
Figure 91. Channels of Distribution
Figure 92. Global Bio Based Ethylene Sales Market Forecast by Region (2027-2032)
Figure 93. Global Bio Based Ethylene Revenue Market Share Forecast by Region (2027-2032)
Figure 94. Global Bio Based Ethylene Sales Market Share Forecast by Source Route (2027-2032)
Figure 95. Global Bio Based Ethylene Revenue Market Share Forecast by Source

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Route (2027-2032)
Figure 96. Global Bio Based Ethylene Sales Market Share Forecast by Application (2027-2032)
Figure 97. Global Bio Based Ethylene Revenue Market Share Forecast by Application (2027-2032)

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