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Global Bio-based Isobutyric Acid Market Growth 2026-2032

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Abstracts

The global Bio-based Isobutyric Acid market size is predicted to grow from US$ 35.75 million in 2025 to US$ 72.44 million in 2032; it is expected to grow at a CAGR of 11.0% from 2026 to 2032.

In 2025, global production of bio-based isobutyric acid stood at approximately 6,300 metric tons, with a global average market price of around $5,800 per metric ton. That year, total global production capacity reached 9,500 metric tons, and the industry's average gross profit margin hit 30%. Bio-based isobutyric acid refers to isobutyric acid products manufactured from renewable biomass resources using green processes such as microbial fermentation, biotransformation, or biocatalysis. Isobutyric acid is a branched-chain fatty acid with the molecular formula C?H?O?; it serves as a vital short-chain carboxylic acid and an intermediate in fine chemical production. Unlike traditional petroleum-based isobutyric acid—which relies primarily on the propylene carbonylation route—bio-based isobutyric acid is synthesized via the metabolic pathways of engineered microorganisms using renewable carbon sources such as glucose, starch-derived sugars, and sugarcane sugars. It offers advantages such as sustainable raw materials, lower carbon emissions, and alignment with green chemistry trends. Bio-based isobutyric acid finds applications in sectors including fragrances, coatings, solvents, plasticizers, pharmaceutical intermediates, bio-based polymers, and fuel additives. Notably, it can be further converted into high-value-added products such as isobutyrate esters, isobutanol, and methacrylate compounds. As the global chemical industry shifts toward low-carbon operations and biomanufacturing, and as corporate demand for sustainable raw materials and green supply chains grows, bio-based isobutyric acid is increasingly emerging as a significant alternative to traditional petrochemical-based isobutyric acid.

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The upstream segment of the bio-based isobutyric acid value chain primarily encompasses the supply of renewable carbon sources, microbial strain development, fermentation auxiliary materials, and biomanufacturing equipment. Key raw materials include corn starch, sugarcane, cassava, wheat sugar syrup, and other sugar-containing biomass resources; these undergo saccharification to yield fermentation substrates like glucose, which serve as the carbon source for microbial synthesis. Currently, production relies on metabolically engineered microorganisms; by optimizing branched-chain amino acid metabolic pathways, these microorganisms convert sugars into isobutyric acid precursors, which are subsequently transformed into the target product. Core upstream technologies focus on constructing high-yield strains, regulating metabolic pathways, optimizing fermentation conditions, and enhancing raw material utilization efficiency. Because the production process involves challenges such as controlling by-products, increasing yields, and mitigating product inhibition, strain performance and fermentation technology are critical determinants of cost competitiveness. The midstream segment primarily covers the fermentation and manufacturing of bio-based isobutyric acid, as well as separation, extraction, refining, and product standardization. During production, microorganisms ferment carbohydrate-based feedstocks to convert carbon sources into isobutyric acid; high-purity isobutyric acid products are subsequently obtained through processes such as filtration, extraction, membrane separation, distillation, and rectification. Currently, bio-based isobutyric acid is in the stage of industrialization, with production scales smaller than those of traditional petrochemical-based routes; industry competition focuses on reducing production costs, enhancing fermentation conversion efficiency, optimizing separation processes, and establishing stable supply capabilities. Bio-based isobutyric acid has a wide range of downstream applications, with the fine chemical and fragrance industries serving as key sectors. Isobutyric acid is used to synthesize isobutyrate esters—such as ethyl isobutyrate and isobutyl isobutyrate—which are utilized in food flavorings, fragrances for daily-use chemicals, and seasoning agents. In the chemical industry, it serves as a vital raw material for producing isobutyrate esters, plasticizers, coating additives, solvents, and other organic intermediates. Furthermore, isobutyric acid can be further processed via biocatalytic and chemical conversion routes into isobutanol, methacrylic acid-related materials, and bio-based fuel components, demonstrating significant potential in the fields of green chemistry and sustainable materials. In the pharmaceutical sector, isobutyric acid and its derivatives are used in the synthesis of certain pharmaceutical intermediates.

The global chemical industry's low-carbon transition and the rising demand for sustainable raw materials are the core drivers behind the development of bio-based isobutyric acid. Produced via microbial fermentation or biotransformation using

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renewable biomass—such as glucose, starch-derived sugars, and sugarcane sugars—bio-based isobutyric acid offers advantages over traditional petrochemical routes, including reduced reliance on fossil resources, lower carbon emissions, and enhanced value within green supply chains. In recent years, regions such as Europe, the United States, China, and Japan have actively advanced carbon neutrality strategies, green manufacturing policies, and the adoption of sustainable chemicals, compelling chemical enterprises to seek alternatives to petroleum-based feedstocks. As a vital short-chain carboxylic acid and fine chemical intermediate, isobutyric acid enjoys steady demand in sectors ranging from fragrances and solvents to coating additives and high-performance chemicals; consequently, the bio-based production route has garnered increasing attention as a key direction for the green chemical industry.

Isobutyric acid serves as a precursor for the production of isobutyrate esters, isobutanol, methacrylic acid derivatives, and other functional chemicals, finding broad application in fragrances, coatings, adhesives, pharmaceutical intermediates, and specialty materials. Driven by consumer demand for natural fragrances, green solvents, and low-carbon materials, downstream enterprises are increasingly seeking chemical feedstocks with traceable bio-based origins. Furthermore, bio-based isobutyric acid holds potential as a platform molecule for future bio-based polymers and sustainable chemicals; as biomanufacturing technologies mature, its application scope is expected to expand from traditional fine chemicals into the realm of high-value-added materials.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Bio-based Isobutyric Acid 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 Isobutyric Acid portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Bio-based Isobutyric Acid market.

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This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Bio-based Isobutyric Acid and breaks down the forecast by Type, 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 Isobutyric Acid.

This report presents a comprehensive overview, market shares, and growth opportunities of Bio-based Isobutyric Acid market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Purity: ?98%

Purity: ?98%

Segmentation by Raw Material Source:

Food Crop-based Bio-Isobutyric Acid

Non-food Biomass-based Bio-Isobutyric Acid

Waste-derived Bio-Isobutyric Acid

Segmentation by Purity Grade:

Feed Grade

Food Grade

Pharmaceutical Grade

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Segmentation by Production Technology Route:

Microbial Fermentation Method

Enzyme-catalyzed Method

Metabolic Engineering Modification Route

Segmentation by Application:

Pharmaceutical

Cosmetics

Food Additives

Plasticizer

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- 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.

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Afyren

Lygos

Key Questions Addressed in this Report

What is the 10-year outlook for the global Bio-based Isobutyric Acid market?

What factors are driving Bio-based Isobutyric Acid market growth, globally and by region?

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

How do Bio-based Isobutyric Acid market opportunities vary by end market size?

How does Bio-based Isobutyric Acid break out by Type, by Application?

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