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Global Bio-based Polyolefins Market Growth 2026-2032

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Abstracts

The global Bio-based Polyolefins market size is predicted to grow from US$ 348 million in 2025 to US$ 729 million in 2032; it is expected to grow at a CAGR of 11.3% from 2026 to 2032.

Bio Based Polyolefins are polyolefin resins such as polyethylene polypropylene and selected polyolefin elastomers where part or all of the carbon originates from renewable resources while the polymers themselves remain chemically identical to their fossil counterparts. Product comprises segregated bio based polyethylene made from dehydrated bio ethanol and a growing portfolio of bio attributed polyethylene polypropylene and elastomers produced via mass balance allocation of renewable feedstocks like bio naphtha and waste derived oils into existing steam crackers.

Biobased content is typically quantified through radiocarbon analysis under standards such as ISO 16620 and ASTM D6866 and many commercial grades are additionally backed by ISCC PLUS certification which tracks renewable content through complex petrochemical value chains. Upstream this market depends on reliable supply of sugarcane ethanol other bio ethanol streams renewable naphtha and bio oils from residues while downstream the materials largely mirror conventional polyolefin uses in flexible and rigid packaging consumer products automotive parts and selected industrial and agricultural applications. The core value proposition is drop in performance combined with lower cradle to gate greenhouse gas emissions and the ability for brand owners to make certified claims on renewable carbon content.

On the supply side Braskem remains the anchor producer with its green ethylene unit in Brazil now capable of 275000 tons per year feeding various grades of Im green bio based polyethylene while Braskem America and several European sites have ISCC

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PLUS certified polypropylene capacity for bio attributed PP. In Europe players such as SABIC Borealis LyondellBasell Dow TotalEnergies INEOS and Repsol convert renewable naphtha from partners like Neste into certified renewable polyolefins marketed under brands including TRUCIRCLE Bornewables CirculenRenew and bio based portfolios for pharma and food packaging. Japan and Asia add further capacity through Mitsui Chemicals Prime Polymer and others which run biomass mass balance PE and PP at ISCC PLUS certified sites while projects at Sumitomo Chemical and partners aim to commercialize ethanol based polyolefins from plant derived propylene. A smaller but strategically important niche is emerging in bio based polyolefin elastomers where Dow offers ENGAGE REN grades and Versalis supplies Balance elastomers based on renewable or bio attributed feedstocks for high performance films foams and impact modifiers.

> Typical procurement models are multi year framework agreements between resin suppliers and large brand owners or converters often tied to specific ISCC PLUS certificates and audited mass balance chains rather than spot transactions. Given the combination of specialty positioning and constrained renewable feedstock availability typical gross margins for bio based polyolefin business lines are around 25 of revenue higher than standard commodity polyolefins and supported by certification know how close brand relationships and integration with renewable feedstock suppliers.

In the current market global production is around 229000 tons with an average selling price of about 1460 USD per ton EXW basis. Demand is currently centered in Europe and North America where brand owner climate commitments plastic taxes and extended producer responsibility schemes create strong pull for certified renewable content while Brazil remains structurally important on the supply side through sugarcane ethanol and integrated green ethylene.
Looking toward 2025 to 2031 industry association data show global bioplastics capacity more than doubling with drop in materials like bio based PE and PP retaining a significant share so bio based polyolefins are expected to expand from a niche of a few hundred thousand tons to a mid scale market as additional crackers obtain ISCC PLUS and brand owners roll out recyclable mono material packaging or low carbon automotive parts. Key drivers will be regulatory pressure on packaging emissions corporate net zero targets and maturing supply chains for renewable naphtha and waste oil while bottlenecks include competition for sustainable biomass limited availability of traceable waste and residue feedstock and the need to maintain price premiums versus highly efficient fossil polyolefin complexes. At the same time digital tools including AI

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supported mass balance tracking scope three accounting and demand forecasting are beginning to be deployed by leading producers and brand owners to optimize certificate allocation and contract portfolios which should gradually reduce transaction costs and facilitate further scale up of bio based polyolefins.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Bio-based Polyolefins Industry Forecast” looks at past sales and reviews total world Bio-based Polyolefins sales in 2025, providing a comprehensive analysis by region and market sector of projected Bio-based Polyolefins sales for 2026 through 2032. With Bio-based Polyolefins sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Bio-based Polyolefins industry.
This Insight Report provides a comprehensive analysis of the global Bio-based Polyolefins 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 Polyolefins portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Bio-based Polyolefins market.
This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Bio-based Polyolefins and breaks down the forecast by Polymer 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 Polyolefins.
This report presents a comprehensive overview, market shares, and growth opportunities of Bio-based Polyolefins market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Polymer Type:

Bio Based Polyethylene

Bio Based Polypropylene

Bio Based Polyolefin Elastomers

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Segmentation by Certification:

ISCC PLUS

Other Recognized Schemes

Segmentation by Feedstock Route:

Ethanol-to-Ethylene

Bio-Attributed (Mass Balance)

Bio-Circular (Mass Balance)

Segmentation by Application:

Flexible Packaging

Rigid Packaging

Consumer Products

Automotive

Industrial

Agriculture

Others

This report also splits the market by region:

Americas

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United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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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

Repsol

Versalis

Dow

Prime Polymer

Formosa Plastics USA

Westlake

LG Chem

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Reliance Industries

India Glycols

Sinopec

Avient

Key Questions Addressed in this Report

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

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

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

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

How does Bio-based Polyolefins break out by Polymer Type, by Application?

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