

Global Biobased Sizing Chemicals Market Growth 2026-2032

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Abstracts

The global Biobased Sizing Chemicals market size is predicted to grow from US\$ 652 million in 2025 to US\$ 796 million in 2032; it is expected to grow at a CAGR of 3.0% from 2026 to 2032.

Biobased sizing chemicals are papermaking additives derived primarily from renewable feedstocks such as starch, rosin, and selected plant-oil chemistries, designed to reduce liquid uptake and improve surface integrity by forming a thin functional layer on fibers or on the sheet surface during size press or film press application. In value chains they sit between agricultural or forestry-based raw materials and paper mills, and they are selected not only for hydrophobizing performance but also for runnability, pick resistance, printability, and compatibility with fillers, retention systems, and coating operations. Commercial differentiation is typically built around controlled molecular modification, consistent viscosity and solids delivery, deposit control, and application engineering that tailors formulation to machine speed, furnish mix, and end-use requirements across packaging, printing, tissue, and specialty grades.

In the current market, global production is around 980 kilo metric ton, with an average selling price of about 680 USD per metric ton EXW basis. Industry concentration is moderate because the volume base is anchored by large starch processors while performance-critical niches rely on specialized papermaking chemical suppliers with application support and mill qualification know-how; as a result, the top suppliers collectively account for about 35% of global revenue as measured by CR5. Regional consumption is led by Asia Pacific due to the scale of packaging and board production, followed by Europe and North America where higher-performance packaging and printing grades sustain demand for consistent surface properties, and where qualification and supplier approval cycles reinforce incumbent positions. Typical gross

margin for this product family is estimated at 27%, reflecting a mix of commodity-like starch derivatives and more specialized rosin or bio-based functional chemistries sold with technical service, while still facing cost pass-through pressure tied to agricultural and forestry feedstock volatility.

Looking ahead, demand is expected to grow steadily through 2026 to 2032 as paper-based packaging continues to substitute for plastics in selected applications and as brand owners tighten sustainability claims that favor renewable-content additives, provided performance can match barrier and print requirements. At the same time, the market will remain constrained by mill economics and by the availability and cost of renewable feedstocks, pushing suppliers toward higher-efficiency chemistries, improved application windows, and tighter control of deposits and foaming. Competitive dynamics will likely intensify around bio-based solutions that can deliver hydrophobicity and surface strength at lower add-on, enabling mills to balance sustainability targets with productivity and quality consistency across fast-running machines.

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

This Insight Report provides a comprehensive analysis of the global Biobased Sizing Chemicals 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 Biobased Sizing Chemicals portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Biobased Sizing Chemicals market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Biobased Sizing Chemicals and breaks down the forecast by Application Stage, 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 Biobased Sizing Chemicals.

This report presents a comprehensive overview, market shares, and growth opportunities of Biobased Sizing Chemicals market by product type, application, key manufacturers and key regions and countries.

Segmentation by Application Stage:

- Wet End Internal Sizing
- Size Press Surface Sizing
- Coating Color Sizing Additive
- Multi Stage Sizing

Segmentation by Biobased Platform:

- Starch Based
- Rosin Tall Oil Based
- Cellulose Derivative Based
- Fatty Acid Based
- Lignin Based
- Other Biobased

Segmentation by Physical Form:

- Powder
- Granule
- Liquid Solution
- Aqueous Dispersion

Emulsion

Segmentation by Application:

Packaging Paperboard

Printing Writing Paper

Tissue Hygiene Paper

Specialty Industrial Paper

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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.

Cargill

Ingredion

Primient

AGRANA

Roquette

Royal Avebe

Galam

Chemigate

Hangzhou Papermate Science And Technology

Kemira

Solenis

Arakawa Chemical Industries

Harima Chemicals Group

Plasmine Technology

Tereos

Key Questions Addressed in this Report

What is the 10-year outlook for the global Biobased Sizing Chemicals market?

What factors are driving Biobased Sizing Chemicals market growth, globally and by region?

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

How do Biobased Sizing Chemicals market opportunities vary by end market size?

How does Biobased Sizing Chemicals break out by Application Stage, by Application?

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