

Global Coal-based Biodegradable Plastic Market Growth 2026-2032

<https://marketpublishers.com/r/GA3F932F64D5EN.html>

Date: July 2026

Pages: 103

Price: US\$ 3,660.00 (Single User License)

ID: GA3F932F64D5EN

Abstracts

The global Coal-based Biodegradable Plastic market size is predicted to grow from US\$ 210 million in 2025 to US\$ 392 million in 2032; it is expected to grow at a CAGR of 9.5% from 2026 to 2032.

Coal-based Biodegradable Plastic refers to biodegradable polymer materials produced from coal chemical feedstocks such as syngas, ethylene glycol, 1,4-butanediol, glycolate esters and oxalate esters, and further processed through polymerization, copolymerization or compounding. The main product scope includes coal-based PGA, coal-based PBAT, coal-based PBS/PBSA and related biodegradable compound materials. These materials combine stable coal chemical feedstock supply, mature industrial chain support and biodegradable plastic application attributes, and are mainly used in packaging films and bags, disposable tableware and food packaging, agricultural mulch films, oilfield temporary plugging materials, injection-molded products and other industrial or specialty applications. Upstream raw materials mainly include coal, syngas, carbon monoxide, methanol, ethylene glycol, 1,4-butanediol, succinic acid, adipic acid, terephthalic acid, methyl glycolate, catalysts and additives. Major downstream customers include biodegradable material compounders, packaging material companies, agricultural film producers, oilfield chemical companies, disposable product manufacturers, injection molding companies and end-brand customers. On an ex-factory price basis, global Coal-based Biodegradable Plastic effective capacity in 2025 is estimated at about 210,000 tons, while global sales volume is estimated at about 72,638 tons, with an average ex-factory price of about USD 2,950 per ton. As this value chain is mainly concentrated in China, actual sales are still affected by the validation progress of downstream biodegradable packaging, agricultural films, oilfield temporary plugging materials and specialty applications. The average industry gross margin is estimated at about 10%-24% in 2025, with relatively higher margins in high-

barrier PGA, oilfield temporary plugging and specialty applications, and relatively lower margins in general packaging film and bag materials and compounded materials due to competition, operating rates and raw material price fluctuations.

The global Coal-based Biodegradable Plastic market is still in the stage of industrial ramp-up and application validation, with the core value chain and production capacity mainly concentrated in China. Overseas companies are more suitable as benchmark producers of related biodegradable plastics such as PGA and PBAT, rather than typical coal-based route manufacturers. The current market is mainly composed of coal-based PGA, coal-based BDO route PBAT/PBS, and related compounded materials, with demand mainly coming from packaging films and bags, disposable foodservice packaging, agricultural mulch films, oilfield temporary plugging materials, and specialty industrial materials. Compared with bio-based materials such as PLA and PHA, coal-based biodegradable plastics rely on coal chemical feedstocks, regional chemical parks, and integrated production facilities, giving them certain advantages in supply stability and scale-up potential. However, market acceptance still depends on product cost, processing compatibility, degradation certification, carbon footprint assessment, and end-use validation. Future market growth will mainly benefit from the extension of the coal chemical value chain into higher-value new materials, continued policy support for biodegradable materials, plastic substitution demand in packaging and agriculture, and rising demand for functional biodegradable materials in oilfield and industrial applications. Coal-based PGA has differentiated potential in high-barrier packaging, oilfield temporary plugging, and specialty materials, while coal-based PBAT and PBS materials are more suitable for blending with starch, PLA, calcium carbonate, and other systems for films, bags, disposable products, and selected injection-molded products. As polymerization processes, compounding formulations, and processing technologies continue to mature, coal-based biodegradable plastics are expected to move gradually from demonstration projects and policy-driven demand toward broader commercial application validation. Key market drivers include the industrial upgrading needs of Chinese coal chemical companies and downstream demand for biodegradable materials with controllable cost, stable supply, and clearly defined performance. For coal chemical companies, developing PGA, PBAT, PBS and related materials can increase the added value of basic chemicals such as syngas, ethylene glycol, BDO, glycolate esters, and succinic acid, while extending the value chain into resins, compounded materials, and end products. For downstream customers, if coal-based biodegradable plastics can achieve a balanced performance in cost, processability, mechanical properties, barrier properties, and degradability, they may gain substitution opportunities in packaging, agriculture, oilfield, and industrial materials. Future competition will shift from capacity expansion alone toward cost control, material

compounding capability, application development capability, and customer qualification capability. The main market barriers include uneven end-market demand, low capacity utilization, relatively high costs for some products, and strong competition from PLA, PBAT, PHA, bio-based PBS, and conventional plastic alternatives. The coal-based attribute has resource and cost advantages within China's coal chemical value chain, but it may face challenges in carbon footprint, environmental perception, and brand acceptance in international markets, especially for premium packaging and export-oriented customers. More complete degradation certification, low-carbon assessment, and life-cycle data will be needed. In addition, although PGA has clear performance differentiation, improvements in processing window, brittleness, cost reduction, and end-use validation still require time. Overall, the Coal-based Biodegradable Plastic market has medium- to long-term growth potential, while the near-term market will be characterized by steady volume growth, structural differentiation, and gradually clearer application scenarios.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Coal-based Biodegradable Plastic 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 Coal-based Biodegradable Plastic.

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

Segmentation by Type:

Coal-based PGA

Coal-based PBAT

Coal-based PBS and PBSA

Others

Segmentation by Product Form:

Coal-to-Syngas Route

Coal-based BDO Route

Coal-based Ethylene Glycol Route

Others

Segmentation by Application:

Packaging

Foodservice and Disposable Products

Agriculture

Industrial

Other

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.

China Energy Investment Corporation

Xinjiang Lanshan Tunhe Technology

Anhui Haoyuan Chemical Group

Shanghai Pujing Chemical

China National Chemical Engineering Group

Shanxi Jinhui Energy Group

Hubei Yihua Group

Kureha Corporation

BASF

Key Questions Addressed in this Report

What is the 10-year outlook for the global Coal-based Biodegradable Plastic market?

What factors are driving Coal-based Biodegradable Plastic market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?
How do Coal-based Biodegradable Plastic market opportunities vary by end market size?
How does Coal-based Biodegradable Plastic break out by Type, by Application?

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