

Global Fossil-based Biodegradable Plastic Market Growth 2026-2032

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Abstracts

The global Fossil-based Biodegradable Plastic market size is predicted to grow from US\$ 2032 million in 2025 to US\$ 3467 million in 2032; it is expected to grow at a CAGR of 7.9% from 2026 to 2032.

Fossil-based Biodegradable Plastic refers to biodegradable polymer materials produced from petrochemical or coal chemical monomers such as dicarboxylic acids, diols, lactones and glycolate esters, and further processed through polymerization, copolymerization or compounding. The main product scope includes PBAT, PBS/PBSA, PCL, PGA and related biodegradable compound materials. Although these materials are not primarily bio-based in feedstock origin, they can degrade under industrial composting, soil, hydrolysis or specific environmental conditions, and are mainly used in packaging films and bags, disposable foodservice packaging, agricultural mulch films, injection-molded products, daily-use products, oilfield temporary plugging materials and other industrial or specialty applications. Upstream raw materials mainly include adipic acid, terephthalic acid, succinic acid, 1,4-butanediol, caprolactone, glycolate esters, ethylene glycol, catalysts, chain extenders, fillers and functional additives. Major downstream customers include biodegradable material compounders, packaging product manufacturers, agricultural film producers, foodservice packaging companies, injection molding companies, oilfield chemical companies and end-brand customers. On an ex-factory price basis, global Fossil-based Biodegradable Plastic effective capacity in 2025 is estimated at about 2,250,000 tons, while global sales volume is estimated at about 824,600 tons, with an average ex-factory price of about USD 2,520 per ton. PBAT and its compound materials account for the majority of shipment volume, while PBS/PBSA, PCL and PGA are more focused on specific performance requirements or higher-value applications. The average industry gross margin is estimated at about 10%-24% in 2025, with relatively lower margins in general packaging and film-grade

materials due to competition, low operating rates and raw material price fluctuations, and relatively higher margins in PCL, PGA, high-performance PBS and specialty industrial applications.

The global Fossil-based Biodegradable Plastic market has developed a product structure led by PBAT, with PBS/PBSA, PCL, PGA and related compound materials serving as complementary segments. Applications are mainly concentrated in packaging films, shopping bags, garbage bags, disposable foodservice packaging, agricultural mulch films, injection-molded products and selected industrial specialty materials. Compared with bio-based biodegradable materials such as PLA and PHA, fossil-based biodegradable plastics generally offer better processing compatibility, stronger flexibility and impact resistance, and more mature industrialization experience. PBAT, in particular, is highly suitable for flexible films and bag applications. However, due to rapid capacity expansion in some regions, the industry still faces low operating rates, price competition and product homogenization, putting pressure on profitability in general packaging-grade materials. Future market growth will mainly benefit from the continued implementation of biodegradable material policies, plastic substitution demand in packaging and agriculture, and end customers' emphasis on stable material performance and processing convenience. PBAT and its compounds will remain the main volume contributor, mainly used in films, bags, disposable packaging and agricultural films. PBS/PBSA, supported by good heat resistance and processing performance, is expected to expand in foodservice packaging, injection-molded products and composite materials. PCL and PGA have smaller shipment volumes, but they offer higher added value in medical materials, specialty industrial applications, high-barrier packaging, oilfield temporary plugging and high-performance compound systems. As blending, filling modification, degradation control and downstream processing technologies continue to mature, the application scope of fossil-based biodegradable plastics will further expand. Key market drivers include environmental regulations, plastic restriction policies, sustainable packaging demand from brand owners, pressure to address agricultural film waste, and the need to replace conventional plastics in selected applications. For downstream customers, fossil-based biodegradable plastics have relatively good compatibility with existing extrusion, blown film, cast film, injection molding and thermoforming equipment, which helps reduce process adjustment costs during material substitution. For producers, PBAT, PBS, PGA and related products can extend the petrochemical and coal chemical value chains and increase the added value of upstream monomers such as BDO, adipic acid, succinic acid, terephthalic acid, caprolactone and glycolate esters. Companies with stable raw material supply, large-scale polymerization capability, formulation development capability and end-customer qualification will be better positioned in future competition.

The main market barriers include uneven downstream demand, excess capacity in general-purpose products, costs that remain higher than conventional plastics, and competition from PLA, PHA, paper-based materials, recycled plastics and plastic reduction solutions. Although some fossil-based biodegradable plastics have biodegradable or compostable properties, their feedstocks are not bio-based, which may create challenges in carbon footprint positioning, brand communication and acceptance in overseas markets. At the same time, certification requirements for biodegradability, compostability and soil degradation vary across countries and regions, requiring continuous investment in testing, certification and application validation. Overall, the Fossil-based Biodegradable Plastic market is expected to maintain steady growth, while competition will shift from capacity expansion alone toward cost control, material modification, certification compliance, application development and customer service capability.

LP Information, Inc. (LPI) ' newest research report, the "Fossil-based Biodegradable Plastic Industry Forecast" looks at past sales and reviews total world Fossil-based Biodegradable Plastic sales in 2025, providing a comprehensive analysis by region and market sector of projected Fossil-based Biodegradable Plastic sales for 2026 through 2032. With Fossil-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 Fossil-based Biodegradable Plastic industry.

This Insight Report provides a comprehensive analysis of the global Fossil-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 Fossil-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 Fossil-based Biodegradable Plastic market.

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

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

Segmentation by Type:

PBAT

PBS and PBSA

PCL

PGA

Others

Segmentation by Feedstock Route:

Petrochemical-based Route

Coal Chemical-based Route

Others

Segmentation by Product Form:

Resin Pellets

Modified Granules

Others

Segmentation by Application:

Packaging Films and Bags

Disposable Tableware and Food Packaging

Agricultural Mulch Films

Injection Molding and Daily-Use Products

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.

BASF

Versalis

Kureha Corporation

Daicel Corporation

Wanhua Chemical Group

Kingfa Sci. & Tech.

Xinjiang Lanshan Tunhe Technology

China Energy Investment Corporation

Anhui Haoyuan Chemical Group

Shandong Dawn Polymer

Zhejiang Hisun Biomaterials

SK Chemicals

Key Questions Addressed in this Report

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

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

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

How do Fossil-based Biodegradable Plastic market opportunities vary by end market size?

How does Fossil-based Biodegradable Plastic break out by Type, by Application?

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