

Succinic Acid Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

Introduction

The succinic acid market encompasses the production and distribution of butanedioic acid, a four-carbon dicarboxylic acid serving as a versatile chemical intermediate and platform molecule for sustainable chemistry applications. Succinic acid exists in two primary production routes: traditional petroleum-based synthesis through catalytic hydrogenation of maleic anhydride or oxidation of n-butane, and emerging bio-based fermentation processes utilizing renewable feedstocks including corn-derived glucose, sugarcane, and industrial waste streams. The compound demonstrates broad chemical reactivity and functionality, serving as a building block for biodegradable polymers, specialty chemicals, and various industrial products.

The industry serves diverse sectors including industrial chemicals production, food and beverage applications as acidulants and flavor enhancers, pharmaceutical synthesis as intermediates and excipients, personal care formulations, paints and coatings, and emerging applications in biodegradable plastics. Bio-based succinic acid production has gained significant attention as industries pursue sustainable alternatives to petroleum-derived chemicals, driven by carbon footprint reduction goals and circular economy principles. The compound serves as a precursor for 1,4-butanediol, polybutylene succinate, tetrahydrofuran, and other high-value derivatives.

The market benefits from increasing demand for sustainable bio-based chemicals, expanding applications in biodegradable polymer production, growing food and beverage industry consumption, rising pharmaceutical and personal care applications, and regulatory pressures favoring renewable chemical feedstocks. Bio-based

production routes offer environmental advantages including carbon dioxide fixation during fermentation and reduced greenhouse gas emissions compared to petrochemical routes, aligning with corporate sustainability commitments and government decarbonization policies.

Market Size and Growth Forecast

The global succinic acid market is projected to reach 320-350 million USD by 2025, with estimated compound annual growth rates ranging from 6.5% to 9.5% through 2030. This growth trajectory reflects increasing adoption of bio-based alternatives, expanding applications in biodegradable plastics production, growing food and beverage sector demand, and supportive regulatory frameworks promoting renewable chemicals. The bio-based segment demonstrates particularly strong growth potential, with projected CAGRs of 8.0%-12.0%, significantly outpacing traditional petroleum-based production as manufacturers respond to sustainability imperatives and carbon pricing mechanisms.

Regional Analysis

Europe dominates the succinic acid market with growth rates of 5.5%-7.5%, driven by stringent carbon footprint regulations, advanced bio-based chemical manufacturing capabilities, and strong consumer preference for sustainable products. The European Union's carbon pricing schemes and sustainability directives create economic incentives favoring bio-based chemical production over petroleum-derived alternatives. Germany, France, and the Netherlands host major bio-based succinic acid production facilities and maintain leadership in biodegradable polymer development. The region demonstrates particular strength in high-purity pharmaceutical and personal care applications, with established regulatory frameworks supporting bio-based product certification.

Asia Pacific shows growth rates of 6.5%-9.0%, representing the fastest-growing region driven by massive manufacturing capacity, expanding chemical industry, and increasing focus on sustainable production. China dominates regional production through both petroleum-based and emerging bio-based routes, with significant capacity additions from producers including Shandong Landian Biotechnology, Anhui Huaheng Biotechnology, and others. China's biomanufacturing investments and decarbonization roadmap support bio-based chemical expansion, though petroleum-based production remains cost-competitive given established infrastructure and feedstock availability. Japan maintains advanced technology capabilities in specialty applications and bio-based production processes, while India and Southeast Asian countries expand consumption driven by growing food processing, pharmaceuticals, and industrial

chemicals sectors.

North America exhibits growth rates of 5.5%-7.0%, led by the United States where advanced synthetic biology capabilities, venture capital funding for bio-based chemicals, and state-level clean fuel incentives support market development. The U.S. Department of Agriculture identifies succinic acid as a high-priority bio-based product, providing grant funding for strain engineering and waste stream valorization research. California's Low Carbon Fuel Standard awards credit multipliers for biogenic carbon utilization, creating additional revenue opportunities for fermentation-based production. Canada provides accelerated depreciation for biochemical equipment, while Mexico evaluates concessions for bio-intermediate production supporting industrial development.

South America demonstrates growth potential of 5.0%-6.5%, with Brazil leading regional development supported by established sugarcane-based feedstock infrastructure and growing chemical industry. The region's abundant renewable feedstock availability creates natural advantages for bio-based succinic acid production, though commercial-scale operations remain limited. Expanding food and beverage, pharmaceutical, and agricultural sectors drive consumption growth, while regional biodegradable plastics initiatives create emerging opportunities.

The Middle East and Africa region shows growth rates of 4.5%-5.5%, driven by petroleum-based production capabilities and growing industrial chemicals consumption. The region's abundant hydrocarbon resources support traditional petroleum-based synthesis, though bio-based production remains limited. South Africa maintains modest production and consumption, while Gulf states focus primarily on petroleum-derived intermediates. Growing construction and industrial development create demand for coatings and specialty chemical applications.

Application Analysis

BDO: This segment demonstrates projected growth of 7.0%-9.0%, representing the largest single application consuming significant succinic acid volumes as feedstock for 1,4-butanediol production. BDO serves as an essential chemical intermediate for polyurethanes, tetrahydrofuran, and engineering plastics. The segment benefits from expanding polyurethane demand in automotive, construction, and consumer goods applications. Bio-based succinic acid routes to BDO offer sustainable alternatives to traditional petroleum-based processes, attracting interest from major chemical producers pursuing decarbonization commitments. Technical challenges including production costs and yields continue development, but pilot and demonstration-scale

facilities have validated technical feasibility.

Biodegradable Polymer: Expected to grow at 8.0%-11.0%, encompassing polybutylene succinate production for biodegradable plastics applications. PBS demonstrates properties comparable to conventional polyethylene and polypropylene while offering end-of-life biodegradability in composting conditions. The segment benefits from expanding single-use plastics bans, corporate sustainability commitments, and consumer demand for environmentally friendly packaging materials. European Union directives restricting single-use plastics and China's biodegradable plastic mandates create regulatory drivers supporting PBS adoption. Applications span food packaging, agricultural films, and consumer goods. Bio-based succinic acid as a PBS precursor aligns with circular economy principles, offering renewable feedstock sourcing and reduced carbon footprint.

Surfactant: Projected growth of 6.0%-8.0% includes succinic acid derivatives functioning as emulsifiers, dispersants, and surface-active agents in cleaning products, personal care formulations, and industrial applications. The segment benefits from growing consumer preference for bio-based and biodegradable surfactants in home care and personal care products. Succinic acid-derived surfactants offer performance advantages including mildness, low irritation potential, and favorable environmental profiles compared to conventional petroleum-derived alternatives.

Food & Beverages: Growing at 5.5%-7.5%, this segment utilizes succinic acid as an acidulant, flavoring agent, and pH regulator in food processing, beverage formulation, and food preservation applications. The segment benefits from expanding processed food consumption, clean label trends favoring natural ingredients, and functional food development. Succinic acid provides tart flavor notes and antimicrobial properties supporting food safety and shelf-life extension. Bio-based succinic acid aligns with consumer preferences for natural and sustainable food ingredients.

Plasticizer: Expected growth of 5.5%-7.5% encompasses succinic acid derivatives functioning as plasticizing agents improving flexibility and processability of polymer materials. The segment serves applications including biodegradable plastics, specialty coatings, and adhesives. Growing regulatory restrictions on phthalate plasticizers create opportunities for alternative plasticizer technologies, including succinic acid-based formulations offering non-toxic profiles and biodegradability.

Others: This segment growing at 5.0%-7.0% includes diverse applications spanning coatings and resins, agricultural chemicals, pharmaceutical intermediates, and specialty

chemicals. The segment benefits from ongoing research and development identifying new succinic acid applications and expanding existing uses across multiple industries.

Type Analysis

Bio-Based Succinic Acid: This segment demonstrates the fastest growth at 8.0%-12.0%, driven by corporate sustainability commitments, carbon pricing mechanisms, and consumer demand for environmentally friendly products. Bio-based production utilizes fermentation of renewable feedstocks including corn-derived glucose, sugarcane, glycerol from biodiesel production, and cellulosic waste streams. The process fixes carbon dioxide during fermentation, offering lifecycle greenhouse gas emissions reductions of 60% or more compared to petroleum-based synthesis. Major bio-based producers include Reverdia, Succinity, and Myriant, alongside emerging Asian manufacturers. Technical advances in fermentation efficiency, feedstock diversification, and downstream purification have improved economic competitiveness, though production costs remain 50%-150% higher than petroleum-based alternatives depending on feedstock prices and process efficiency. Government policies including renewable chemical incentives, carbon taxes, and bio-based product procurement preferences support market development.

Petro-Based Succinic Acid: Expected to grow at 5.0%-7.0%, this segment represents established technology utilizing catalytic hydrogenation of maleic anhydride derived from n-butane or benzene oxidation. Petroleum-based production maintains cost advantages through established manufacturing infrastructure, economies of scale, and mature process technologies. The segment serves applications prioritizing cost over sustainability attributes and continues dominating total market volume. Producers including Kawasaki Kasei Chemicals, Nippon Shokubai, and Chinese manufacturers maintain significant capacity. The segment faces long-term headwinds from carbon regulations and sustainability pressures but remains commercially important, particularly in price-sensitive applications.

Key Market Players

Reverdia: A joint venture between Roquette and DSM, Reverdia represents a leading bio-based succinic acid producer utilizing advanced fermentation technology. The company operates commercial-scale production facilities and maintains strong technical capabilities in strain development, process optimization, and downstream purification. Reverdia serves global customers across food, pharmaceutical, and industrial applications with high-purity bio-based products.

Succinity: This German company specializes in bio-based succinic acid production through fermentation processes using renewable feedstocks. Succinity maintains production facilities in Europe and serves customers requiring sustainable chemical intermediates for biodegradable polymers, specialty chemicals, and personal care applications. The company focuses on technical support and application development, working with customers to substitute petroleum-based intermediates with bio-based alternatives.

Kawasaki Kasei Chemicals: A major Japanese chemical manufacturer producing petroleum-based succinic acid through traditional catalytic hydrogenation processes. The company maintains significant production capacity and serves Asian and global markets with consistent quality products for industrial chemical, food, and pharmaceutical applications. Kawasaki Kasei demonstrates strong technical capabilities and comprehensive product portfolios across multiple chemical segments.

Nippon Shokubai: This Japanese chemical company produces succinic acid alongside diverse specialty chemical products. The company serves industrial customers requiring reliable supply and consistent quality for downstream chemical synthesis, polymer production, and specialty applications. Nippon Shokubai maintains advanced manufacturing capabilities and quality management systems supporting demanding applications.

Fuso Chemical: A Japanese specialty chemical producer manufacturing succinic acid for pharmaceutical, food, and industrial applications. The company focuses on high-purity products meeting stringent quality requirements for pharmaceutical excipients and food-grade applications. Fuso Chemical maintains strong quality systems and regulatory expertise supporting global customer compliance requirements.

Yantai Shanshui Chemical Technology: A Chinese manufacturer producing petroleum-based succinic acid serving domestic and international markets. The company benefits from cost-competitive production and proximity to major consuming industries in China and Asia Pacific. Yantai Shanshui maintains production capacity supporting diverse applications and customer requirements.

Chinese Manufacturers: A group of emerging Chinese producers including Baoji Jinbaoyu Technology, Shanghai Shenren Fine Chemical, Weinan High-tech Zone Huifeng New Material Technology, ChangMao Biochemical Engineering, Hsuko New Materials, Shandong Landian Biotechnology, Anhui Huaheng Biotechnology, Shandong

Feiyang Chemical, Jinhui Zhaolong High-Tech, Anhui Sunsing Chemicals, and Changzhou Shuguang Chemical Factory represent expanding production capacity in China. These producers manufacture both petroleum-based and bio-based succinic acid through various production routes. Shandong Landian Biotechnology operates bio-based production capacity of 20,000 tons annually, while Anhui Huaheng Biotechnology commissioned 50,000 tons annual bio-based capacity in 2024. These companies serve domestic Chinese markets and increasingly export to international customers, benefiting from cost-competitive production and government support for bio-based chemicals development.

Industry Value Chain Analysis

The succinic acid industry value chain extends from feedstock sourcing through chemical processing and diverse end-use integration. For petroleum-based production, upstream activities include n-butane or benzene procurement from refineries, maleic anhydride synthesis through oxidation processes, and catalytic hydrogenation to succinic acid. This route utilizes established chemical manufacturing infrastructure and well-understood process technologies.

Bio-based production begins with renewable feedstock sourcing including corn, sugarcane, glycerol, or cellulosic materials. Feedstock undergoes pretreatment and fermentation using engineered microorganisms that convert sugars to succinic acid through metabolic pathways. Fermentation broth requires downstream processing including acidification, crystallization, and purification to achieve product specifications. Bio-based production requires specialized fermentation equipment, strain development capabilities, and purification technologies distinct from traditional chemical synthesis.

Distribution channels encompass chemical distributors, specialty chemical suppliers, and direct sales to major industrial customers. Technical service providers support application development, product testing, and formulation optimization for customers integrating succinic acid into finished products. Quality management systems ensure products meet specifications for pharmaceutical, food-grade, or industrial applications, with appropriate regulatory certifications and documentation.

End applications span industrial chemicals production where succinic acid serves as an intermediate for BDO and other derivatives, biodegradable polymer manufacturing for packaging and consumer goods, food and beverage processing, pharmaceutical synthesis, personal care formulations, and coatings production. Each application segment requires specific product grades, quality attributes, and regulatory compliance,

creating differentiated market segments with varying value propositions.

Market Opportunities and Challenges

Bio-Based Chemicals Transition: Corporate sustainability commitments, carbon pricing mechanisms, and regulatory incentives create substantial opportunities for bio-based succinic acid producers. Companies pursuing Scope 3 emissions reductions increasingly seek bio-based chemical intermediates, creating premium market segments willing to pay cost premiums for sustainability attributes. Government procurement preferences for bio-based products in Europe and the United States provide additional market access advantages.

Biodegradable Plastics Expansion: Regulatory restrictions on single-use plastics, corporate packaging commitments, and consumer demand for environmentally friendly materials drive rapid growth in biodegradable polymer markets. Succinic acid-based PBS represents a technically viable and increasingly cost-competitive alternative to conventional plastics, creating substantial volume growth opportunities. Continued technology development improving properties, processing, and cost-effectiveness will expand addressable markets.

Feedstock Diversification: Emerging technologies utilizing industrial waste streams, carbon dioxide, and cellulosic materials as fermentation feedstocks offer opportunities to improve economics and sustainability of bio-based production. Second and third-generation feedstocks reduce competition with food crops and can utilize waste valorization, improving environmental profiles and potentially reducing production costs.

Emerging Applications: Ongoing research identifies new applications for succinic acid and derivatives, including advanced materials, pharmaceutical intermediates, and specialty chemicals. Companies investing in application development and technical support to customers entering new markets can capture first-mover advantages in high-value segments.

Challenges

Production Cost Competitiveness: Bio-based succinic acid production costs remain substantially higher than petroleum-based alternatives, estimated at

2.50-4.00 USD per kilogram versus 1.00-1.50 USD per kilogram for petroleum-based production. This cost gap constrains bio-based market penetration except where sustainability premiums or regulatory advantages offset price differentials. Continued technology development improving fermentation yields, feedstock efficiency, and downstream processing costs remains critical for commercial viability.

Commercial-Scale Production Challenges: Historical challenges in bio-based succinic acid commercialization include multiple facility closures and idled plants. BioAmber's production ceased in 2019 due to financial challenges, with assets subsequently acquired by LCY Biosciences, which suspended production in 2023 due to weak demand. GC Innovation America's facility faced extended idle periods before permanent closure in 2021. These commercial setbacks reflect ongoing challenges achieving sustainable profitability in bio-based chemical production, including demand development, customer qualification cycles, and capital intensity.

Feedstock Cost and Availability Volatility: Bio-based production remains exposed to agricultural commodity price fluctuations, weather impacts on feedstock availability, and competition with food and fuel applications for renewable feedstock sources. Petroleum-based production faces different but equally significant feedstock price volatility linked to crude oil and natural gas markets. Managing feedstock cost volatility while maintaining price competitiveness represents ongoing operational challenges for all producers.

Trump Administration Tariff Policy Uncertainty and Global Supply Chain Impacts: Current trade policy uncertainties create risks for chemical manufacturers with global supply chains. Potential tariffs on chemical intermediates imported from China could increase costs for downstream customers utilizing Asian-sourced succinic acid. Conversely, tariffs on U.S. chemical exports could disadvantage North American producers in global markets. Bio-based production economics may prove particularly sensitive to trade policies affecting agricultural feedstocks and renewable chemical imports. Supply chain restructuring and regionalization trends may reshape competitive dynamics, potentially favoring producers with localized supply chains and customer proximity. Trade policies favoring domestic chemical production could support bio-based investments if coupled with feedstock and technology development incentives.

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