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Bio-Based Chemical Intermediates Market Forecasts to 2032 - Global Analysis By Product Type (Bio-based Solvents, Bio-based Polymers, Bio-based Resins, Bio-based Acids and Bio-based Alcohols), Feedstock Source, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Bio-Based Chemical Intermediates Market is accounted for $29.43 billion in 2025 and is expected to reach $53.79 billion by 2032 growing at a CAGR of 9.0% during the forecast period. Bio-based chemical intermediates originate from renewable resources including crops, organic waste, and biomass, providing a sustainable alternative to fossil-derived chemicals. They act as key inputs for manufacturing plastics, coatings, fuels, medicines, and industrial chemicals. Rising emphasis on environmental protection, emission reduction, and resource efficiency is driving market demand. By reducing dependence on petroleum and decreasing carbon footprints, these intermediates enable greener production processes. Continuous innovations in bio-refining, enzymatic processing, and chemical conversion technologies are enhancing scalability and performance, allowing bio-based intermediates to match conventional products while supporting long-term sustainability and circular economic models.

According to the U.S. Department of Agriculture (USDA), bio?based products?including chemical intermediates?generated $470 billion in value added to the U.S. economy in 2017 and supported 4.6 million American jobs, showing the scale of the parent market.

Market Dynamics:

Driver:

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Growing demand for sustainable and green products

The rising preference for eco-friendly and sustainable products among consumers and industries is fueling the bio-based chemical intermediates market. Buyers increasingly favor materials derived from renewable sources that support lower emissions and environmental impact. This changing demand is encouraging manufacturers to incorporate bio-based intermediates into various applications, including packaging, construction materials, and consumer products. Companies are also using sustainability-focused formulations to strengthen brand value and meet customer expectations. As green consumption trends continue to expand, bio-based chemical intermediates are becoming critical to sustainable product innovation.

Restraint:

High production costs and price competitiveness

Elevated manufacturing expenses are a significant challenge for the bio-based chemical intermediates market. Renewable feedstocks, specialized processing methods, and emerging technologies often lead to higher costs compared to conventional petrochemical-based products. Smaller production volumes and variability in agricultural raw materials further limit cost efficiency. This pricing disadvantage makes adoption difficult in markets where cost remains a primary decision factor. Without improved scalability and cost-reduction innovations, high production costs are likely to continue constraining the broader commercialization of bio-based chemical intermediates.

Opportunity:

Expansion of bio-refining and circular economy models

Growth in bio-refining infrastructure and circular economy practices offers strong opportunities for the bio-based chemical intermediates market. Advanced bio-refineries can transform renewable biomass and waste streams into high-value chemical building blocks. Circular economy approaches emphasize recycling, reuse, and waste conversion, improving resource efficiency. These practices reduce raw material costs and environmental footprints while increasing process profitability. As governments and industries promote circularity, bio-based chemical intermediates are positioned to play a central role in sustainable value chains and future-focused chemical production systems.

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Threat:

Competition from low-cost petrochemical alternatives

Strong competition from inexpensive petrochemical intermediates represents a major threat to the bio-based chemical intermediates market. Conventional chemical products are produced using mature technologies and extensive infrastructure, resulting in cost efficiencies that bio-based alternatives often struggle to match. When oil prices decline, petrochemical intermediates gain further pricing advantages. This economic disparity discourages manufacturers from adopting renewable alternatives, especially in markets focused on cost minimization, thereby restricting the growth potential of bio-based chemical intermediates.

Covid-19 Impact:

The outbreak of COVID-19 created both challenges and opportunities for the bio-based chemical intermediates market. Early phases of the pandemic led to supply chain interruptions, labor shortages, and limited access to biomass feedstocks, temporarily slowing production. Declining demand from several end-use industries negatively impacted sales volumes. Nevertheless, the crisis highlighted the importance of sustainable materials and diversified supply chains. During the recovery period, renewed focus on environmental goals and resilient manufacturing encouraged increased adoption of bio-based chemical intermediates, aiding market recovery and future expansion.

The bio-based polymers segment is expected to be the largest during the forecast period

The bio-based polymers segment is expected to account for the largest market share during the forecast period, driven by their wide applicability in multiple high-volume industries. They are increasingly used as sustainable alternatives to traditional plastics, supporting environmental goals without compromising functionality. Their adaptability across packaging, industrial materials, and consumer applications makes them highly preferred. Rising sustainability commitments from manufacturers and brand owners are accelerating their adoption. Advances in bio-polymer development and improved processing efficiency continue to enhance performance and scalability, allowing bio-based polymers to maintain a strong market presence and remain the most widely utilized bio-based chemical intermediates.

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The microorganisms segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the microorganisms segment is predicted to witness the highest growth rate, supported by continuous progress in microbial engineering and bioprocess technologies. Engineered microbes allow precise and efficient production of diverse chemical intermediates from renewable resources. Their adaptability to various feedstocks and lower environmental impact enhance industrial appeal. Growing focus on sustainable manufacturing and rising funding for bio-innovation are further boosting adoption. As production processes become more efficient and scalable, microorganisms are increasingly favored, enabling this segment to outpace other feedstock categories in growth momentum.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share, driven by its strong commitment to sustainability and circular economy principles. Favorable policies promoting renewable materials and low-carbon manufacturing have encouraged widespread adoption of bio-based intermediates. The region benefits from mature technological capabilities, robust innovation ecosystems, and established industrial players focused on green transformation. Growing application across industrial, consumer, and specialty chemical sectors continues to support market leadership. In addition, rising awareness among manufacturers and consumers regarding environmental responsibility further strengthens Europe?s position as the leading regional market for bio-based chemical intermediates.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, supported by strong economic expansion and rising sustainability awareness. Rapid growth in industries such as packaging, textiles, automotive, and chemicals is driving demand for renewable chemical inputs. Governments across the region are implementing policies that encourage bio-based manufacturing and investment in clean technologies. In addition, easy access to diverse biomass resources and improving technological capabilities enhance production potential. These combined factors are enabling Asia-Pacific to outpace other regions in growth momentum within the bio-based chemical intermediates market.

Key players in the market

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Some of the key players in Bio-Based Chemical Intermediates Market include BASF SE, Cargill, Incorporated, DSM, DuPont, Braskem, Evonik Industries AG, GFBiochemicals Ltd., LyondellBasell Industries Holdings B.V., Novozymes, NatureWorks, Genomatica, LanzaTech, DMC Biotechnologies, Arboris and TotalEnergies Corbion.

Key Developments:

In December 2025, BASF and Oqema have signed a distribution agreement covering polymer dispersions for construction and architectural coatings as well as additives for paints and coatings in selected Central and Eastern European countries. The partnership will take effect on January 1, 2026, and includes markets such as the Czech Republic, Hungary, Romania, Slovakia and Croatia.

In July 2025, Cargill and PepsiCo announced a strategic collaboration to advance regenerative agriculture practices across 240,000 acres from 2025 through 2030. The collaboration will focus on the companies' shared corn supply chain in Iowa, where Cargill sources from local farmers to produce ingredients used in some of PepsiCo's most iconic products.

In January 2025, Evonik Industries AG and Oerlikon Barmag have announced their cooperation to promote chemical recycling of polyethylene terephthalate (PET) waste. Both companies are committed to develop technologies for robust and efficient depolymerisation and purification processes, coupled with an integrated concept for repolymerization and the associated EPC business models.

Product Types Covered:

Bio-based Solvents

Bio-based Polymers

Bio-based Resins

Bio-based Acids

Bio-based Alcohols

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Feedstock Sources Covered:

- Biomass
- Agricultural Waste
- Forestry Residues
- Microorganisms

Applications Covered:

- Fuels & Energy
- Plastics & Materials
- Coatings & Adhesives
- Technical Textiles & Fibers
- Pharma & Biotech Applications

End Users Covered:

- Automotive Industry
- Construction Sector
- Packaging Industry
- Textile Industry
- Healthcare Sector
- Consumer Goods Industry

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Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific

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South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
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- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)
- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Contents

1 EXECUTIVE SUMMARY

2 PREFACE

2.1 Abstract
2.2 Stake Holders
2.3 Research Scope
2.4 Research Methodology
  2.4.1 Data Mining
  2.4.2 Data Analysis
  2.4.3 Data Validation
  2.4.4 Research Approach
2.5 Research Sources
  2.5.1 Primary Research Sources
  2.5.2 Secondary Research Sources
  2.5.3 Assumptions

3 MARKET TREND ANALYSIS

3.1 Introduction
3.2 Drivers
3.3 Restraints
3.4 Opportunities
3.5 Threats
3.6 Product Analysis
3.7 Application Analysis
3.8 End User Analysis
3.9 Emerging Markets
3.10 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

4.1 Bargaining power of suppliers
4.2 Bargaining power of buyers
4.3 Threat of substitutes
4.4 Threat of new entrants
4.5 Competitive rivalry

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5 GLOBAL BIO-BASED CHEMICAL INTERMEDIATES MARKET, BY PRODUCT TYPE

5.1 Introduction
5.2 Bio-based Solvents
5.3 Bio-based Polymers
5.4 Bio-based Resins
5.5 Bio-based Acids
5.6 Bio-based Alcohols

6 GLOBAL BIO-BASED CHEMICAL INTERMEDIATES MARKET, BY FEEDSTOCK SOURCE

6.1 Introduction
6.2 Biomass
6.3 Agricultural Waste
6.4 Forestry Residues
6.5 Microorganisms

7 GLOBAL BIO-BASED CHEMICAL INTERMEDIATES MARKET, BY APPLICATION

7.1 Introduction
7.2 Fuels & Energy
7.3 Plastics & Materials
7.4 Coatings & Adhesives
7.5 Technical Textiles & Fibers
7.6 Pharma & Biotech Applications

8 GLOBAL BIO-BASED CHEMICAL INTERMEDIATES MARKET, BY END USER

8.1 Introduction
8.2 Automotive Industry
8.3 Construction Sector
8.4 Packaging Industry
8.5 Textile Industry
8.6 Healthcare Sector
8.7 Consumer Goods Industry

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9 GLOBAL BIO-BASED CHEMICAL INTERMEDIATES MARKET, BY GEOGRAPHY

9.1 Introduction
9.2 North America
  9.2.1 US
  9.2.2 Canada
  9.2.3 Mexico
9.3 Europe
  9.3.1 Germany
  9.3.2 UK
  9.3.3 Italy
  9.3.4 France
  9.3.5 Spain
  9.3.6 Rest of Europe
9.4 Asia Pacific
  9.4.1 Japan
  9.4.2 China
  9.4.3 India
  9.4.4 Australia
  9.4.5 New Zealand
  9.4.6 South Korea
  9.4.7 Rest of Asia Pacific
9.5 South America
  9.5.1 Argentina
  9.5.2 Brazil
  9.5.3 Chile
  9.5.4 Rest of South America
9.6 Middle East & Africa
  9.6.1 Saudi Arabia
  9.6.2 UAE
  9.6.3 Qatar
  9.6.4 South Africa
  9.6.5 Rest of Middle East & Africa

10 KEY DEVELOPMENTS

10.1 Agreements, Partnerships, Collaborations and Joint Ventures
10.2 Acquisitions & Mergers
10.3 New Product Launch

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10.4 Expansions
10.5 Other Key Strategies

11 COMPANY PROFILING

11.1 BASF SE
11.2 Cargill, Incorporated
11.3 DSM
11.4 DuPont
11.5 Braskem
11.6 Evonik Industries AG
11.7 GFBiochemicals Ltd.
11.8 LyondellBasell Industries Holdings B.V.
11.9 Novozymes
11.10 NatureWorks
11.11 Genomatica
11.12 LanzaTech
11.13 DMC Biotechnologies
11.14 Arboris
11.15 TotalEnergies Corbion

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List Of Tables

LIST OF TABLES

Table 1 Global Bio-Based Chemical Intermediates Market Outlook, By Region (2024-2032) ($MN)
Table 2 Global Bio-Based Chemical Intermediates Market Outlook, By Product Type (2024-2032) ($MN)
Table 3 Global Bio-Based Chemical Intermediates Market Outlook, By Bio-based Solvents (2024-2032) ($MN)
Table 4 Global Bio-Based Chemical Intermediates Market Outlook, By Bio-based Polymers (2024-2032) ($MN)
Table 5 Global Bio-Based Chemical Intermediates Market Outlook, By Bio-based Resins (2024-2032) ($MN)
Table 6 Global Bio-Based Chemical Intermediates Market Outlook, By Bio-based Acids (2024-2032) ($MN)
Table 7 Global Bio-Based Chemical Intermediates Market Outlook, By Bio-based Alcohols (2024-2032) ($MN)
Table 8 Global Bio-Based Chemical Intermediates Market Outlook, By Feedstock Source (2024-2032) ($MN)
Table 9 Global Bio-Based Chemical Intermediates Market Outlook, By Biomass (2024-2032) ($MN)
Table 10 Global Bio-Based Chemical Intermediates Market Outlook, By Agricultural Waste (2024-2032) ($MN)
Table 11 Global Bio-Based Chemical Intermediates Market Outlook, By Forestry Residues (2024-2032) ($MN)
Table 12 Global Bio-Based Chemical Intermediates Market Outlook, By Microorganisms (2024-2032) ($MN)
Table 13 Global Bio-Based Chemical Intermediates Market Outlook, By Application (2024-2032) ($MN)
Table 14 Global Bio-Based Chemical Intermediates Market Outlook, By Fuels & Energy (2024-2032) ($MN)
Table 15 Global Bio-Based Chemical Intermediates Market Outlook, By Plastics & Materials (2024-2032) ($MN)
Table 16 Global Bio-Based Chemical Intermediates Market Outlook, By Coatings & Adhesives (2024-2032) ($MN)
Table 17 Global Bio-Based Chemical Intermediates Market Outlook, By Technical Textiles & Fibers (2024-2032) ($MN)
Table 18 Global Bio-Based Chemical Intermediates Market Outlook, By Pharma &

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Biotech Applications (2024-2032) ($MN)
Table 19 Global Bio-Based Chemical Intermediates Market Outlook, By End User (2024-2032) ($MN)
Table 20 Global Bio-Based Chemical Intermediates Market Outlook, By Automotive Industry (2024-2032) ($MN)
Table 21 Global Bio-Based Chemical Intermediates Market Outlook, By Construction Sector (2024-2032) ($MN)
Table 22 Global Bio-Based Chemical Intermediates Market Outlook, By Packaging Industry (2024-2032) ($MN)
Table 23 Global Bio-Based Chemical Intermediates Market Outlook, By Textile Industry (2024-2032) ($MN)
Table 24 Global Bio-Based Chemical Intermediates Market Outlook, By Healthcare Sector (2024-2032) ($MN)
Table 25 Global Bio-Based Chemical Intermediates Market Outlook, By Consumer Goods Industry (2024-2032) ($MN)
Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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