

# **Bio-Based Chemicals & Materials Market Forecasts to 2034 – Global Analysis By Product (Bio-Based Polymers, Bio-Based Solvents, Bio-Based Surfactants, Bio-Based Plasticizers, Bio-Based Fibers & Resins, Other Products), Feedstock Source, Processing Technology, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Bio-Based Chemicals & Materials Market is accounted for \$120.16 billion in 2026 and is expected to reach \$249.36 billion by 2034 growing at a CAGR of 9.5% during the forecast period. Bio-Based Chemicals & Materials are derived wholly or partially from renewable biological resources such as plants, agricultural waste, algae, or microorganisms. These materials serve as sustainable alternatives to fossil-based chemicals and are used in applications including plastics, coatings, adhesives, textiles, packaging, and personal care products. They help reduce greenhouse gas emissions, dependency on petroleum, and environmental pollution. Bio-based solutions support circular economy principles by promoting biodegradability, recyclability, and resource efficiency. Increasing regulatory pressure, sustainability commitments, and demand for eco-friendly products are accelerating the adoption of bio-based chemicals and materials across multiple industries.

### **Market Dynamics:**

Driver:

Rising demand for sustainable materials

Consumer preference for eco-friendly packaging and textiles boosts demand across automotive, construction, and FMCG sectors. Regulatory frameworks in Europe and North America propel compliance with circular economy goals. Corporate sustainability commitments foster investment in renewable feedstocks. Expanding awareness of climate change accelerates substitution of conventional plastics with bio-based variants. Collectively, these dynamics are propelling the market toward long-term growth.

#### Restraint:

##### High production cost structures

Expensive feedstock conversion processes constrain affordability compared to petrochemical alternatives. Limited economies of scale hamper cost efficiency in emerging markets. Capital-intensive biorefineries degrade margins for smaller producers. Complex supply chains constrain pricing flexibility. Consequently, high production costs continue to hinder market penetration despite rising demand.

#### Opportunity:

##### Innovation in biodegradable polymers

Advanced R&D accelerates development of high-performance materials with reduced environmental impact. Strategic collaborations propel commercialization of novel polymer blends. Rising investment in enzymatic and microbial technologies fosters breakthroughs in cost efficiency. Expanding consumer preference for compostable packaging accelerates adoption. Overall, innovation in biodegradable polymers is propelling new revenue streams and strengthening market competitiveness.

#### Threat:

##### Volatile feedstock supply prices

Fluctuations in agricultural commodities such as corn, sugarcane, and soy hinder cost predictability. Climate variability constrains consistent feedstock availability. Geopolitical tensions degrade supply chain resilience. Rising demand for food crops hampers allocation for industrial use. Consequently, volatility in feedstock prices continues to limit scalability and degrade investor confidence.

**Covid-19 Impact:**

The Covid-19 pandemic accelerated awareness of sustainability, fostering demand for bio-based materials in packaging and healthcare. Rising e-commerce boosted reliance on eco-friendly packaging solutions. Supply chain disruptions constrained feedstock availability, hampering production capacity. Capital investment slowed due to economic uncertainty, limiting expansion projects. Recovery phases fostered renewed interest in green initiatives, accelerating adoption post-pandemic. Overall, Covid-19 acted as both a short-term constraint and a long-term catalyst for bio-based innovation.

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 due to rising demand for sustainable materials across packaging, automotive, and textiles. Strong regulatory support accelerates substitution of conventional plastics. Expanding consumer preference for eco-friendly packaging fosters adoption. Continuous innovation in biodegradable polymers propels product diversification. Strategic partnerships with FMCG companies accelerate commercialization. Collectively, bio-based polymers are propelling dominance in the overall market.

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

Over the forecast period, the enzymatic processing segment is predicted to witness the highest growth rate as rising demand for sustainable materials accelerates adoption of cost-efficient and eco-friendly production methods. Enzymatic technologies foster reduced energy consumption compared to chemical processes. Breakthroughs in microbial engineering propel scalability. Strategic R&D investments accelerate commercialization of enzymatic pathways. Expanding applications in packaging and healthcare foster demand.

**Region with largest share:**

During the forecast period, the Europe region is expected to hold the largest market share owing to rising demand for sustainable materials boosting adoption across automotive, packaging, and construction industries. Strong regulatory frameworks such as the EU Green Deal propel compliance. Established biorefineries accelerate

commercialization of advanced polymers. Consumer preference for eco-friendly products fosters consistent demand. Strategic collaborations with FMCG and automotive companies accelerate innovation.

### **Region with highest CAGR:**

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to rising demand for sustainable materials accelerating adoption across China, India, Japan, and Southeast Asia. Rapid industrialization fosters integration of bio-based chemicals in packaging and textiles. Government initiatives in China and India propel investment in biorefineries. Expanding middle-class incomes accelerate willingness to pay for eco-friendly products. Strategic partnerships foster commercialization of biodegradable polymers.

### **Key players in the market**

Some of the key players in Bio-Based Chemicals & Materials Market include BASF SE, Dow Inc., DuPont de Nemours, Inc., DSM-Firmenich AG, Arkema S.A., Evonik Industries AG, Braskem S.A., Mitsubishi Chemical Group Corporation, Covestro AG, LANXESS AG, Solvay S.A., NatureWorks LLC, Novamont S.p.A., TotalEnergies SE and Clariant AG.

### **Key Developments:**

In February 2024, Dow completed the acquisition of Circulus, a leading recycler of plastic waste into post-consumer resin (PCR). This acquisition enhances Dow's ability to offer circular and bio-attributed solutions by integrating recycled content with its bio-based feedstock streams.

In October 2023, DuPont announced a strategic collaboration with Origin Materials, a carbon-negative materials company, to develop and commercialize bio-based materials for applications in the water, industrial technologies, and next-generation automotive sectors.

### **Products Covered:**

Bio-Based Polymers

Bio-Based Solvents

Bio-Based Surfactants

Bio-Based Plasticizers

Bio-Based Fibers & Resins

Other Products

Feedstock Sources Covered:

Agricultural Crops

Forestry Biomass

Organic Waste & Residues

Industrial By-Products

Other Feedstock Sources

Processing Technologies Covered:

Fermentation

Biochemical Conversion

Thermochemical Conversion

Enzymatic Processing

Other Processing Technologies

Applications Covered:

Packaging

Automotive

Construction

Textiles

Electronics

Other Applications

End Users Covered:

Industrial Manufacturers

Consumer Goods Companies

Chemical Producers

Government & Public Institutions

Other End Users

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of 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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

**Company Profiling**

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

**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

## Contents

### **1 EXECUTIVE SUMMARY**

- 1.1 Market Snapshot and Key Highlights
- 1.2 Growth Drivers, Challenges, and Opportunities
- 1.3 Competitive Landscape Overview
- 1.4 Strategic Insights and Recommendations

### **2 RESEARCH FRAMEWORK**

- 2.1 Study Objectives and Scope
- 2.2 Stakeholder Analysis
- 2.3 Research Assumptions and Limitations
- 2.4 Research Methodology
  - 2.4.1 Data Collection (Primary and Secondary)
  - 2.4.2 Data Modeling and Estimation Techniques
  - 2.4.3 Data Validation and Triangulation
  - 2.4.4 Analytical and Forecasting Approach

### **3 MARKET DYNAMICS AND TREND ANALYSIS**

- 3.1 Market Definition and Structure
- 3.2 Key Market Drivers
- 3.3 Market Restraints and Challenges
- 3.4 Growth Opportunities and Investment Hotspots
- 3.5 Industry Threats and Risk Assessment
- 3.6 Technology and Innovation Landscape
- 3.7 Emerging and High-Growth Markets
- 3.8 Regulatory and Policy Environment
- 3.9 Impact of COVID-19 and Recovery Outlook

### **4 COMPETITIVE AND STRATEGIC ASSESSMENT**

- 4.1 Porter's Five Forces Analysis
  - 4.1.1 Supplier Bargaining Power
  - 4.1.2 Buyer Bargaining Power
  - 4.1.3 Threat of Substitutes
  - 4.1.4 Threat of New Entrants

- 4.1.5 Competitive Rivalry
- 4.2 Market Share Analysis of Key Players
- 4.3 Product Benchmarking and Performance Comparison

## **5 GLOBAL BIO-BASED CHEMICALS & MATERIALS MARKET, BY PRODUCT**

- 5.1 Bio-Based Polymers
- 5.2 Bio-Based Solvents
- 5.3 Bio-Based Surfactants
- 5.4 Bio-Based Plasticizers
- 5.5 Bio-Based Fibers & Resins
- 5.6 Other Products

## **6 GLOBAL BIO-BASED CHEMICALS & MATERIALS MARKET, BY FEEDSTOCK SOURCE**

- 6.1 Agricultural Crops
- 6.2 Forestry Biomass
- 6.3 Organic Waste & Residues
- 6.4 Industrial By-Products
- 6.5 Other Feedstock Sources

## **7 GLOBAL BIO-BASED CHEMICALS & MATERIALS MARKET, BY PROCESSING TECHNOLOGY**

- 7.1 Fermentation
- 7.2 Biochemical Conversion
- 7.3 Thermochemical Conversion
- 7.4 Enzymatic Processing
- 7.5 Other Processing Technologies

## **8 GLOBAL BIO-BASED CHEMICALS & MATERIALS MARKET, BY APPLICATION**

- 8.1 Packaging
- 8.2 Automotive
- 8.3 Construction
- 8.4 Textiles
- 8.5 Electronics
- 8.6 Other Applications

## **9 GLOBAL BIO-BASED CHEMICALS & MATERIALS MARKET, BY END USER**

- 9.1 Industrial Manufacturers
- 9.2 Consumer Goods Companies
- 9.3 Chemical Producers
- 9.4 Government & Public Institutions
- 9.5 Other End Users

## **10 GLOBAL BIO-BASED CHEMICALS & MATERIALS MARKET, BY GEOGRAPHY**

- 10.1 North America
  - 10.1.1 United States
  - 10.1.2 Canada
  - 10.1.3 Mexico
- 10.2 Europe
  - 10.2.1 United Kingdom
  - 10.2.2 Germany
  - 10.2.3 France
  - 10.2.4 Italy
  - 10.2.5 Spain
  - 10.2.6 Netherlands
  - 10.2.7 Belgium
  - 10.2.8 Sweden
  - 10.2.9 Switzerland
  - 10.2.11 Poland
  - 10.2.11 Rest of Europe
- 10.3 Asia Pacific
  - 10.3.1 China
  - 10.3.2 Japan
  - 10.3.3 India
  - 10.3.4 South Korea
  - 10.3.5 Australia
  - 10.3.6 Indonesia
  - 10.3.7 Thailand
  - 10.3.8 Malaysia
  - 10.3.9 Singapore
  - 10.3.11 Vietnam
  - 10.3.11 Rest of Asia Pacific

## 10.4 South America

10.4.1 Brazil

10.4.2 Argentina

10.4.3 Colombia

10.4.4 Chile

10.4.5 Peru

10.4.6 Rest of South America

## 10.5 Rest of the World (RoW)

10.5.1 Middle East

10.5.1.1 Saudi Arabia

10.5.1.2 United Arab Emirates

10.5.1.3 Qatar

10.5.1.4 Israel

10.5.1.5 Rest of Middle East

10.5.2 Africa

10.5.2.1 South Africa

10.5.2.2 Egypt

10.5.2.3 Morocco

10.5.2.4 Rest of Africa

## 11 STRATEGIC MARKET INTELLIGENCE

11.1 Industry Value Network and Supply Chain Assessment

11.2 White-Space and Opportunity Mapping

11.3 Product Evolution and Market Life Cycle Analysis

11.4 Channel, Distributor, and Go-to-Market Assessment

## 12 INDUSTRY DEVELOPMENTS AND STRATEGIC INITIATIVES

12.1 Mergers and Acquisitions

12.2 Partnerships, Alliances, and Joint Ventures

12.3 New Product Launches and Certifications

12.4 Capacity Expansion and Investments

12.5 Other Strategic Initiatives

## 13 COMPANY PROFILES

13.1 BASF SE

13.2 Dow Inc.

- 13.3 DuPont de Nemours, Inc.
- 13.4 DSM-Firmenich AG
- 13.5 Arkema S.A.
- 13.6 Evonik Industries AG
- 13.7 Braskem S.A.
- 13.8 Mitsubishi Chemical Group Corporation
- 13.9 Covestro AG
- 13.10 LANXESS AG
- 13.11 Solvay S.A.
- 13.12 NatureWorks LLC
- 13.13 Novamont S.p.A.
- 13.14 TotalEnergies SE
- 13.15 Clariant AG

## List Of Tables

### LIST OF TABLES

- Table 1 Global Bio-Based Chemicals & Materials Market Outlook, By Region (2023-2034) (\$MN)
- Table 2 Global Bio-Based Chemicals & Materials Market, By Product (2023–2034) (\$MN)
- Table 3 Global Bio-Based Chemicals & Materials Market, By Bio-Based Polymers (2023–2034) (\$MN)
- Table 4 Global Bio-Based Chemicals & Materials Market, By Bio-Based Solvents (2023–2034) (\$MN)
- Table 5 Global Bio-Based Chemicals & Materials Market, By Bio-Based Surfactants (2023–2034) (\$MN)
- Table 6 Global Bio-Based Chemicals & Materials Market, By Bio-Based Plasticizers (2023–2034) (\$MN)
- Table 7 Global Bio-Based Chemicals & Materials Market, By Bio-Based Fibers & Resins (2023–2034) (\$MN)
- Table 8 Global Bio-Based Chemicals & Materials Market, By Other Products (2023–2034) (\$MN)
- Table 9 Global Bio-Based Chemicals & Materials Market, By Feedstock Source (2023–2034) (\$MN)
- Table 10 Global Bio-Based Chemicals & Materials Market, By Agricultural Crops (2023–2034) (\$MN)
- Table 11 Global Bio-Based Chemicals & Materials Market, By Forestry Biomass (2023–2034) (\$MN)
- Table 12 Global Bio-Based Chemicals & Materials Market, By Organic Waste & Residues (2023–2034) (\$MN)
- Table 13 Global Bio-Based Chemicals & Materials Market, By Industrial By-Products (2023–2034) (\$MN)
- Table 14 Global Bio-Based Chemicals & Materials Market, By Other Feedstock Sources (2023–2034) (\$MN)
- Table 15 Global Bio-Based Chemicals & Materials Market, By Processing Technology (2023–2034) (\$MN)
- Table 16 Global Bio-Based Chemicals & Materials Market, By Fermentation (2023–2034) (\$MN)
- Table 17 Global Bio-Based Chemicals & Materials Market, By Biochemical Conversion (2023–2034) (\$MN)
- Table 18 Global Bio-Based Chemicals & Materials Market, By Thermochemical

Conversion (2023–2034) (\$MN)

Table 19 Global Bio-Based Chemicals & Materials Market, By Enzymatic Processing (2023–2034) (\$MN)

Table 20 Global Bio-Based Chemicals & Materials Market, By Other Processing Technologies (2023–2034) (\$MN)

Table 21 Global Bio-Based Chemicals & Materials Market, By Application (2023–2034) (\$MN)

Table 22 Global Bio-Based Chemicals & Materials Market, By Packaging (2023–2034) (\$MN)

Table 23 Global Bio-Based Chemicals & Materials Market, By Automotive (2023–2034) (\$MN)

Table 24 Global Bio-Based Chemicals & Materials Market, By Construction (2023–2034) (\$MN)

Table 25 Global Bio-Based Chemicals & Materials Market, By Textiles (2023–2034) (\$MN)

Table 26 Global Bio-Based Chemicals & Materials Market, By Electronics (2023–2034) (\$MN)

Table 27 Global Bio-Based Chemicals & Materials Market, By Other Applications (2023–2034) (\$MN)

Table 28 Global Bio-Based Chemicals & Materials Market, By End User (2023–2034) (\$MN)

Table 29 Global Bio-Based Chemicals & Materials Market, By Industrial Manufacturers (2023–2034) (\$MN)

Table 30 Global Bio-Based Chemicals & Materials Market, By Consumer Goods Companies (2023–2034) (\$MN)

Table 31 Global Bio-Based Chemicals & Materials Market, By Chemical Producers (2023–2034) (\$MN)

Table 32 Global Bio-Based Chemicals & Materials Market, By Government & Public Institutions (2023–2034) (\$MN)

Table 33 Global Bio-Based Chemicals & Materials Market, By Other End Users (2023–2034) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) are also represented in the same manner as above.

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