

# **Bio-Isobutene Market Forecasts to 2032 – Global Analysis By Raw Material (Straw Derived, Sugar Beet, Cane-Derived and Other Raw Materials), Application (Fuel, Butyl Rubber, Bio-Based Cosmetic Ingredients, Lubricant Additives, Plastics, Adhesives and Other Applications), End User and By Geography**

<https://marketpublishers.com/r/BF89868F769CEN.html>

Date: July 2025

Pages: 150

Price: US\$ 4,150.00 (Single User License)

ID: BF89868F769CEN

## **Abstracts**

According to Statistics MRC, the Global Bio-Isobutene Market is accounted for \$32.57 billion in 2025 and is expected to reach \$51.96 billion by 2032 growing at a CAGR of 6.9% during the forecast period. Bio-isobutene is a renewable, bio-based alternative to traditional fossil-derived isobutene, primarily produced through the fermentation of plant-based sugars using engineered microorganisms. It is an essential component in the manufacturing of plastics, synthetic rubber, high-performance fuels, and other specialty chemicals. Bio-isobutene is a desirable alternative in the transition to sustainable and circular economies because it provides substantial environmental advantages, such as lower greenhouse gas emissions and a smaller carbon footprint.

According to a meta analysis by ACS Sustainable Chemistry & Engineering, shifting production from fossil to biomass feedstocks for twelve major chemicals could save an estimated 120 million tonnes of CO<sub>2</sub> equivalent annually, while cutting fossil energy use by 1,500 PJ per year—a level broadly applicable to bio isobutene as part of the biochemicals sector.

Market Dynamics:

Driver:

## Demand for additives and renewable fuels

High-performance, renewable fuels such as bio-isooctane and ETBE (ethyl tert-butyl ether) are blended with gasoline to improve how well it burns and to reduce harmful particles, and they are mainly produced from bio-isobutene. Due to strict fuel quality and carbon intensity regulations, like the EU's Renewable Energy Directive II (RED II) and California's Low Carbon Fuel Standard (LCFS), there is a growing need for low-emission fuel additives. Additionally, bio-isobutene plays an increasingly important role in maintaining engine performance and environmental compliance as the transportation industry moves toward greener fuels.

### Restraint:

#### Expensive manufacturing compared to fossil-based substitutes

The comparatively high cost of producing bio-isobutene is one of the biggest obstacles to its widespread use. The fermentation-based methods used to produce bio-isobutene frequently call for complex biotechnological infrastructure and costly feedstocks, such as glucose from wheat or sugar beets. Purification and separation are examples of downstream processing that can be expensive and energy-intensive. Fossil-based isobutene, on the other hand, benefits from well-established, scale-efficient petrochemical processes. Additionally, price-sensitive sectors like rubber production and fuel blending might be reluctant to make the switch until carbon pricing, subsidies, or legislative requirements level the playing field.

### Opportunity:

#### High potential in the plastics and synthetic rubber sectors

A crucial monomer in the synthesis of butyl rubber, polyisobutylene, and other elastomers used in adhesives, pharmaceutical packaging, automotive, and construction is bio-isobutene. Consumers and regulations are now pressuring these industries to use sustainable materials. A promising opportunity for bio-isobutene to replace its fossil-derived counterpart is being created by the growing trend of bio-based rubbers and plastics. Furthermore, bio-isobutene's compatibility with current manufacturing infrastructure speeds up its adoption in synthetic materials by facilitating the switch for businesses without requiring extensive equipment overhauls.

### Threat:

## Vigorous rivalry from well-known petrochemical products

The market for bio-isobutene is fiercely competitive with established isobutene and related hydrocarbons derived from petroleum. Decades of infrastructure investment and technological advancement have resulted in lower unit costs, large production capacities, and established supply chains for these traditional alternatives. Bio-isobutene, on the other hand, is a relatively recent entrant and finds it difficult to match these economies of scale. Moreover, changes in the price of crude oil can occasionally make fossil-based isobutene even more affordable, which further reduces the competitiveness of its bio-based counterpart, particularly in markets where prices are sensitive, like those for fuels and rubber.

## Covid-19 Impact:

The COVID-19 pandemic affected the bio-isobutene market in a variety of ways. Supply chain disruptions, labor shortages, and decreased industrial activity, especially in the chemical and renewable fuels industries, temporarily halted research, pilot projects, and scale-up efforts. As businesses refocused on critical functions, investments in bio-based infrastructure were postponed. The crisis did, however, also highlight the significance of robust, sustainable supply chains and hasten the global movement toward environmentally friendly recovery plans. As economies started to recover, bio-isobutene was positioned as a strategic asset in the post-pandemic shift to low-carbon industries due to the renewed focus on climate goals, clean energy, and sustainable materials.

The sugar beet segment is expected to be the largest during the forecast period

The sugar beet segment is expected to account for the largest market share during the forecast period because it is widely available in places like North America and Europe, has a high fermentable sugar content, and has effective conversion rates. Because it allows for consistent yields and works well with the current bio-refining infrastructure, sugar beet is a preferred feedstock for microbial fermentation. It is a dependable and scalable resource due to its shorter growing cycle and tolerance for temperate climates. Furthermore, sugar beet's sustainability profile—which includes less water use and land requirement than some other crops—further supports its place in the production of bio-isobutene.

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

Over the forecast period, the fuel segment is predicted to witness the highest growth rate. Low-carbon blendstock adoption is being accelerated by regulatory requirements like California's Low Carbon Fuel Standard and the EU's Renewable Energy Directive II. Bio-based fuels are becoming more competitive as a result of technological advancements in fermentation and catalytic processing that are reducing production costs. Moreover, the demand for fuel additives derived from bio-isobutene is expected to increase at the fastest rate across all applications as automakers and refiners look for sustainable ways to meet strict emissions targets.

Region with largest share:

During the forecast period, the Europe region is expected to hold the largest market share, driven by a strong commitment to sustainability goals, sophisticated bio-refining infrastructure, and robust regulatory support. The Green Deal policies and the Renewable Energy Directive (RED II) of the European Union have made it easier for bio-based fuels and chemicals to be adopted. With significant investments in bio-isobutene research and commercial production, nations like France and Germany are leading the way. Furthermore, a consistent supply of feedstock is guaranteed by Europe's well-established agricultural base, especially in the production of sugar beets.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR as a result of the growing automotive and cosmetics industries, fast industrialization, and rising demand for sustainable materials. To meet international climate commitments and lessen their reliance on fossil fuels, nations like China, India, Japan, and South Korea are making significant investments in green chemical production and renewable technologies. Market expansion is also being accelerated by growing consumer preference for eco-friendly products, favorable government initiatives supporting bio-based industries, and rising environmental awareness. Additionally, the region's extensive agricultural base offers a wealth of biomass feedstocks, which makes it the perfect place to scale up the production of bio-isobutene in the years to come.

Key players in the market

Some of the key players in Bio-Isobutene Market include Clariant AG, Honeywell International Inc., Eastman Chemical Company, Butamax Advanced Biofuels LLC, Gevo, Inc., The Dow Chemical Company, Exxon Mobil Corporation, BASF SE, Songwon Industrial Co. Ltd., LanzaTech Inc., Butagaz SAS, Evonik Industries AG,

DuPont de Nemours, Lanxess AG, Ineos Group Holdings S.A. and Global Bioenergies Inc.

#### Key Developments:

In April 2025, Gevo, Inc. and Future Energy Global are pleased to announce that they have signed a pioneering offtake agreement for carbon abatement attributes, to enable airlines and other companies to reduce their CO2 emissions through Sustainable Aviation Fuel (SAF).

In March 2025, Eastman Chemical Company entered into a severance agreement with Brad A. Lich, outlining severance benefits in the event of certain employment terminations. The agreement includes a \$2 million cash severance payment and up to four months of healthcare coverage, contingent on compliance with restrictive covenants and a release of claims.

In December 2024, Honeywell announced the signing of a strategic agreement with Bombardier, a global leader in aviation and manufacturer of world-class business jets, to provide advanced technology for current and future Bombardier aircraft in avionics, propulsion and satellite communications technologies. The collaboration will advance new technology to enable a host of high-value upgrades for the installed Bombardier operator base, as well as lay innovative foundations for future aircraft. Honeywell estimates the value of this partnership to the company at \$17 billion over its life.

#### Raw Materials Covered:

Straw Derived

Sugar Beet

Cane-Derived

Other Raw Materials

#### Applications Covered:

Fuel

Butyl Rubber

Bio-Based Cosmetic Ingredients

Lubricant Additives

Plastics

Adhesives

Other Applications

End Users Covered:

Automotive

Aerospace

Pharmaceuticals

Other End Users

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

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
- 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

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