

# **Biosolvents Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Alcohols, Diols & Glycols, Esters, Others), By Application (Industrial & Domestic Cleaners, Paints & Coatings, Adhesives & Sealants, Printing Inks, Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Biosolvents Market is projected to expand from USD 6.68 Billion in 2025 to USD 9.49 Billion by 2031, registering a compound annual growth rate of 6.03%.

Biosolvents are defined as sustainable alternatives to conventional petrochemical solvents, derived from renewable biomass sources such as agricultural crops, seeds, and vegetable oils. The primary catalysts driving this market growth include stringent environmental regulations designed to reduce Volatile Organic Compounds and a growing global focus on lowering carbon footprints within industrial processes.

Highlighting the significant industrial capacity for bio-based chemicals in solvent and fuel applications, the Renewable Fuels Association reported that global ethanol production reached approximately 31.2 billion gallons in 2024.

However, a significant barrier to market expansion is the higher production cost of biosolvents compared to fossil-based equivalents, a discrepancy often stemming from complex processing requirements and lower economies of scale. This price gap can discourage widespread adoption in cost-sensitive industries where conventional solvents remain the more affordable option. Furthermore, the volatility of agricultural feedstock prices adds complexity to long-term planning for manufacturers and introduces economic uncertainty throughout the supply chain.

## **Market Driver**

Strategic transitions toward green chemistry and bio-economy initiatives are fundamentally reshaping the Global Biosolvents Market by prioritizing renewable carbon sources over established fossil-based incumbents. This shift is accelerated by substantial government support and industrial investments designed to foster a circular economy, which directly benefits the development of bio-based chemical supply chains. These initiatives create the necessary economic framework for manufacturers to switch from conventional petrochemicals to safer, renewable alternatives. Illustrating the massive economic scale currently driving the commercialization of renewable chemical alternatives, the U.S. Department of Agriculture's March 2024 report, 'An Economic Impact Analysis of the U.S. Biobased Products Industry,' noted that the biobased products sector contributed USD 489 billion in value added to the United States economy.

The robust growth of the paints and coatings sector serves as a second critical catalyst for widespread biosolvent adoption, driven by the demand for high-performance, low-toxicity formulations. Major coatings manufacturers are aggressively reformulating their portfolios to replace conventional volatile organic compounds with sustainable bio-based esters and alcohols, effectively aligning sustainability with profitability. For instance, PPG Industries reported in its April 2024 '2023 ESG Report' that 44% of total sales were generated from sustainably advantaged products, underscoring the increasing reliance on eco-friendly inputs. This sectoral demand matches upstream trends, as raw material availability expands to meet industrial needs; according to European Bioplastics in 2023, global production capacity for bio-based materials is projected to reach approximately 7.43 million tonnes by 2028, ensuring a strengthened feedstock foundation.

### **Market Challenge**

The elevated production cost of biosolvents relative to conventional petrochemical alternatives constitutes a critical impediment to market expansion. This price disparity largely stems from the capital-intensive nature of converting renewable biomass into high-purity chemicals, which often involves intricate fermentation and purification processes. In price-sensitive industries such as paints, coatings, and industrial cleaning, procurement decisions are primarily driven by operational margins. Consequently, the premium attached to biosolvents discourages manufacturers from switching away from established, lower-cost fossil solvents, thereby restricting the market penetration of renewable alternatives to niche applications rather than mass adoption.

This challenge is further intensified by the difficulty in achieving economies of scale. Without consistent, high-volume demand, bio-based manufacturers are unable to operate facilities at the optimal levels required to reduce per-unit costs, leaving them at a disadvantage against the mature petrochemical sector. According to European Bioplastics, in 2024, the average capacity utilization rate for the global bio-based industry stood at approximately 58%. This significant underutilization highlights the operational inefficiencies that sustain high production costs, preventing biosolvents from reaching the competitive pricing necessary to challenge fossil-based equivalents in the broader industrial market.

## Market Trends

The valorization of lignocellulosic and agricultural waste for second-generation solvents is rapidly emerging as a primary trend, fundamentally altering feedstock strategies to bypass the food-versus-fuel debate. Manufacturers are increasingly utilizing advanced refining technologies to convert low-value residues, such as waste oils and forestry by-products, into high-purity renewable chemicals, thereby decoupling solvent production from volatile commodity crop markets. This shift toward circularity ensures a stable supply of technical-grade precursors necessary for downstream chemical synthesis without compromising food security. According to Neste, in the August 2025 article 'Neste's renewable diesel journey,' the company's total production capacity for renewable products, derived largely from diverse waste and residue raw materials, has reached approximately 5.5 million tons annually, underscoring the industrial scalability of waste-to-chemical pathways.

Concurrently, the development of carbon-neutral solvent portfolios to support Scope 3 emission reduction has become a critical competitive differentiator for suppliers targeting sustainability-focused end markets. Chemical producers are aggressively expanding their capacity for bio-based alcohols and ethers that offer drop-in performance with verifiable carbon reduction metrics, allowing customers in the pharmaceutical and electronics sectors to lower their indirect emissions profiles. This trend is driving significant volume growth in renewable solvent manufacturing, as verified environmental attributes become a standard procurement requirement. According to Verbio SE's September 2025 'Annual Report 2024/2025,' the company's production of bioethanol, a key solvent and intermediate, reached 582,610 metric tons for the fiscal year, reflecting the surging demand for low-carbon chemical inputs in global supply chains.

## Key Market Players

Archer Daniels Midland Company

BASF SE

Solvay S.A.

Cargill, Incorporated

Stepan Company

Corbion NV

Dow Inc.

GF Biochemicals Limited

CREMER OLEO GmbH & Co. KG

Vertec BioSolvents Inc.

## Report Scope

In this report, the Global Biosolvents Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Biosolvents Market, By Type

Alcohols

Diols & Glycols

Esters

Others

### Biosolvents Market, By Application

Industrial & Domestic Cleaners

Paints & Coatings

Adhesives & Sealants

Printing Inks

Others

## Biosolvents Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Biosolvents Market.

## **Available Customizations:**

Global Biosolvents Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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