

Bio-Succinic Acid Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (BDO, Polyester Polyols, Plasticizers, PBS/PBST, Alkyd Resins, Polymers and Esters, Solvents and Coatings, Others), By End User (Food and Beverages, Pharmaceuticals, Personal Care and Cosmetics, Others), By Region and Competition, 2019-2029F

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Abstracts

Global Bio-Succinic Acid Market was valued at USD 126.36 Million in 2023 and is anticipated to grow with a CAGR of 4.43% through 2029. Bio-succinic acid, derived from renewable biomass, stands as a pivotal chemical compound boasting extensive utility across various industries. Its potential to supplant conventional petroleum-derived succinic acid is gaining traction, owing to its environmentally conscious manufacturing process and sustainable characteristics. This alternative, sourced from bio-resources, showcases comparable performance attributes while concurrently reducing carbon footprints and diminishing reliance on finite energy sources. Its adoption is on the rise across sectors like pharmaceuticals, agriculture, food and beverage, cosmetics, and bioplastics, where ecological considerations profoundly influence product innovation and consumer preferences. In addition to its role in product formulations, bio-succinic acid plays a crucial role in numerous biochemical processes within the human body. When externally applied, it harbors the potential to alleviate joint pain and discomfort associated with arthritis. Bio-Succinic Acid is also acknowledged for its efficacy in reducing signs of aging and aiding in the mitigation of skin scars.

The anticipated surge in demand for bio-succinic acid stems from the escalating interest in natural products, perceived as both safe for human use and environmentally friendly. The market landscape is marked by intense competition, characterized by the presence of numerous multinational corporations engaged in production, research, and development endeavors. With a diverse array of products experiencing robust demand, the global bio-succinic acid market is poised for substantial expansion.

The burgeoning demand for eco-friendly alternatives underscores a pivotal shift in consumer preferences towards sustainability and environmental stewardship. As regulatory frameworks continue to tighten around emissions and waste management, industries are increasingly compelled to explore sustainable alternatives to conventional chemical compounds. Bio-succinic acid emerges as a viable solution, offering not only comparable performance but also environmental benefits, aligning with the broader sustainability goals of businesses and governments alike.

The versatility of bio-succinic acid renders it adaptable to a wide array of applications, further driving its market growth. In pharmaceuticals, it serves as a key ingredient in drug formulations, owing to its biocompatibility and therapeutic properties. In agriculture, it finds utility as a component in fertilizers and crop protection products, contributing to enhanced agricultural practices with minimal environmental impact. Its use in the food and beverage industry as a flavoring agent and preservative underscores its multifaceted appeal across diverse sectors.

The growing recognition of bio-succinic acid's benefits extends beyond its immediate applications, transcending broader sustainability narratives. As businesses strive to meet consumer demands for eco-friendly products and governments enact stringent regulations to curb carbon emissions, bio-based alternatives like succinic acid are poised to play an increasingly integral role in fostering a more sustainable future.

Bio-succinic acid represents a compelling alternative to traditional petroleum-derived succinic acid, offering comparable performance characteristics alongside environmental advantages. Its increasing adoption across various industries reflects a broader shift towards sustainability and environmental responsibility. As market demand continues to escalate, fueled by consumer preferences for natural and eco-friendly products, the global bio-succinic acid market is primed for significant expansion, heralding a promising era for sustainable chemical compounds.

Key Market Drivers

Rising Demand for Sustainable Alternatives

The rising demand for sustainable alternatives serves as a significant driver for the Global Bio-Succinic Acid. As environmental concerns such as climate change, pollution, and resource depletion gain traction, there's an increasing preference for products with minimal environmental impact. Bio-succinic acid, sourced from renewable biomass, emerges as a sustainable substitute for conventional petroleum-derived succinic acid. Its production process emits fewer carbon emissions and reduces reliance on finite fossil fuels, aligning with sustainability objectives.

Many firms are actively embracing sustainability initiatives as part of their corporate social responsibility (CSR) endeavors, aiming to reduce their ecological footprint, utilize renewable resources, and promote circular economy principles. In November 2023, the NEOSUCCESS project, funded by the European Union, discovered a method to leverage biogas plants for environmental gains. Through a straightforward plug-and-play technology, these plants can now generate biomethane and bio-succinic acid (BioSA) simultaneously. Succinic acid stands as a pivotal multifunctional industrial chemical, predominantly sourced from petroleum. With this innovation, existing biogas plants can seamlessly retrofit to produce biomethane and bio-succinic acid, marking a significant step towards sustainability in industrial processes. Integrating bio-succinic acid into their offerings enables companies to showcase their sustainability commitment and appeal to environmentally conscious consumers.

The shift towards sustainability presents lucrative market prospects for bio-based chemicals like succinic acid. As industries and consumers increasingly prioritize sustainability, the demand for bio-succinic acid is projected to rise across diverse sectors, including pharmaceuticals, agriculture, food and beverage, cosmetics, and bioplastics. This offers opportunities for firms engaged in bio-succinic acid production and distribution to capitalize on the escalating market demand and expand their business endeavors.

Rising Demand for Personal Care Products

There's a rising consumer preference for personal care items containing natural and organic components. Bio-succinic acid, sourced from renewable biomass, fits well into this trend as it's perceived as a natural substitute for synthetic chemicals commonly found in personal care products. It's authorized by Ecocert, non-GMO, and

derived entirely from renewable vegetable sources, making it a safe, sustainable, and versatile alternative to other commonly used acids like salicylic acid in cosmetics. This novel, natural ingredient offers specific benefits such as antimicrobial, anti-acne, anti-psoriasis, antioxidant, and slimming properties, enabling the creation of a wide range of cosmetics and toiletries including body washes, shower gels, scrubs, exfoliation products, shampoos, and soaps with antimicrobial qualities, among others.

Succinic acid is associated with various cosmetic advantages, such as stimulating mitochondrial respiration, acting as an antioxidant, and exhibiting significant antimicrobial activity against acne-causing microorganisms. Additionally, it serves as an excellent pH modifier due to its high-water solubility. Succinate esters like heptyl succinate or iso-octyl succinate are commonly utilized in cosmetics as emollients, further enhancing the effectiveness and quality of personal care formulations.

In the competitive personal care market, manufacturers are constantly searching for innovative ingredients to set their products apart. Integrating bio-succinic acid into personal care formulations enables companies to offer distinctive and environmentally friendly products that appeal to eco-conscious consumers, thereby gaining a competitive advantage. Biologically produced succinic acid is increasingly favored as petroleum prices fluctuate, and commercial decisions increasingly prioritize environmental concerns alongside pricing considerations. The growing demand for personal care products is driving the need for bio-succinic acid as a crucial ingredient in formulations, contributing to the expansion of the Global Bio-Succinic Acid Market.

Key Market Challenges

Cost Competitiveness

Technological Cost competitiveness poses a significant challenge for the Global Bio-Succinic Acid Market. Bio-succinic acid directly competes with petroleum-based succinic acid and other petrochemical alternatives. Petrochemicals often enjoy advantages such as established infrastructure, lower production costs, and economies of scale, which can make it difficult for bio-succinic acid to compete solely on price. In markets where price sensitivity is high, this competitive pricing pressure can constrain the market share and growth prospects of bio-succinic acid.

The availability and price fluctuations of feedstock, such as biomass or agricultural residues, used in bio-succinic acid production, can impact overall production costs. Variations in feedstock prices, disruptions in the supply chain, and competition from

other industries can introduce uncertainty and instability in the cost of bio-succinic acid production.

Despite advancements in biotechnology that have enhanced efficiency, these processes are costlier compared to conventional methods employed in petroleum-based succinic acid production. Elevated production costs can hinder the competitiveness of bio-succinic acid, particularly in price-sensitive markets.

Technological Limitations

Despite advancements in biotechnology enhancing the efficiency of bio-succinic acid production, challenges persist in optimizing fermentation processes and increasing yield. Achieving high yields of bio-succinic acid while ensuring cost-effectiveness and minimizing production time remains a technological hurdle.

Scaling up production from laboratory or pilot-scale to commercial-scale operations poses significant technological challenges. Factors like process scalability, equipment design, and process control must be carefully optimized to ensure consistent and reliable bio-succinic acid production at larger volumes. Maintaining stringent purity and quality standards is imperative for bio-succinic acid acceptance in various industries, notably pharmaceuticals and food. Technological limitations in purification and quality control processes can impact the purity, consistency, and performance of bio-succinic acid, constraining its market potential.

Continuous technological innovation is essential to enhance resource efficiency in bio-succinic acid production, including reducing water and energy consumption, minimizing waste generation, and optimizing raw material utilization. Improving resource efficiency not only cuts production costs but also bolsters the environmental sustainability of bio-succinic acid production.

Key Market Trends

Growing Emphasis on Bioplastics

Increasing concerns about plastic pollution and the pursuit of sustainability objectives have resulted in a notable increase in the demand for bioplastics. Bio-succinic acid plays a crucial role as a primary component in the manufacturing of biodegradable and compostable plastics, thereby fueling its demand within this industry segment. Bioplastics, derived from bio-succinic acid, are increasingly gaining favor as eco-friendly

alternatives to conventional plastics. Bio-succinic acid plays a pivotal role as a fundamental component in various bioplastic materials like PBS, PBAT, and PBSA. The rising demand for bioplastics is driving the need for bio-succinic acid as an essential raw material.

Bioplastics offer the opportunity to decrease carbon dioxide emissions by a minimum of 30%, if not more, and their adoption can result in a 42% reduction in carbon footprints. Additionally, the production of bioplastics consumes 65% less energy compared to conventional petroleum-based plastics. Regulatory initiatives targeting plastic waste reduction and environmental sustainability, coupled with growing consumer consciousness, are propelling the adoption of bioplastics. Businesses face mounting pressure to align with sustainability objectives and meet consumer preferences for green products. There is a growing interest in procuring renewable and biodegradable inputs like bio-succinic acid for bioplastic manufacturing.

Collaboration among stakeholders along the bioplastics value chain, including bio-succinic acid suppliers, bioplastic producers, brands, and research entities, fosters innovation and stimulates market expansion. BioAmber Inc. and South Korean-based CJ CheilJedang Corporation (CJ CJ) have entered a non-binding letter of intent to establish a joint venture focused on producing bio-succinic acid. The plan involves retrofitting an existing CJ CJ fermentation facility in China with BioAmber's succinic acid technology, requiring minimal capital investment. These partnerships facilitate the enhancements in production techniques, and the broadening of market penetration, thereby spurring demand for bio-succinic acid as a vital ingredient.

Segmental Insights

Application Insights

Based on application, the 1,4-butanediol (BDO) segment emerged as the dominant segment in the global market for Bio-Succinic Acid in 2023. This can be attributed to the strong demand for products like polyurethane, tetrahydrofuran, and polybutylene, among others. The utilization of 1,4-butanediol (BDO) extends across various sectors, from major polymer manufacturing to its role in the production of plastics. Key polymers such as polyurethanes, polyethers, and polyesters rely on BDO as a crucial component in their manufacturing processes. Particularly noteworthy is BDO's significant contribution to the production of polybutylene terephthalate (PBT) and tetrahydrofuran (THF) resins used in plastic engineering applications. The rising demand for BDO and its derivatives, including THF, is anticipated to drive the

demand for bio-succinic acid, fostering robust market growth.

Regulatory measures promoting the adoption of renewable and sustainable chemicals, coupled with mandates aimed at reducing carbon emissions and environmental impact, create an enabling environment for the expansion of bio-based chemicals like BDO. Canada's government announced a USD 1 Million investment in compostable bioplastics in February 2024. The global implementation of single-use plastic bans also serves as a driving force for bioplastics production, including BDO. Government incentives and policies supporting the uptake of bio-based materials further encourage investment and innovation in the bio-succinic acid market.

End User Insights

Based on end user, the food and beverages segment emerged as the dominant in the global market for Bio-Succinic acid in 2023. Bio-succinic acid plays a significant role in the food and beverage sector, serving as both a flavor enhancer and a stabilizing agent for pH levels and preservation. Its utilization contributes to improving the sensory qualities, longevity, and overall quality of a wide array of food and beverage items. As consumer preferences lean towards natural and organic ingredients in this sector, bio-succinic acid, sourced from renewable materials like biomass, aligns well with this trend, offering a viable substitute for synthetic additives.

Bio-succinic acid regulatory approval for food and beverage applications underscores its safety and suitability for consumption. With sustainability emerging as a paramount concern across industries, including food and beverages, bio-succinic acid presents an eco-friendly alternative to traditional petroleum-derived succinic acid, thereby lessening dependence on non-renewable resources and mitigating environmental impact.

Regional Insights

Based on Region, Europe emerged as the dominant region in the Global Bio-Succinic Acid Market in 2023, holding the largest market share. The growth in the European market is fueled by a surge in demand for eco-conscious construction practices in the area. Factors such as escalating carbon emissions, a growing inclination towards utilizing locally sourced materials, and the volatility in fossil fuel prices are pivotal drivers of market expansion in Europe. Additionally, Europe benefits from a robust biotechnology sector, renowned for its proficiency in fermentation techniques crucial for bio-succinic acid production. This established infrastructure has expedited the

commercialization and scaling up of bio-succinic acid manufacturing within the region.

Key Market Players

BASF SE

Roquette Frères SA

Koninklijke DSM N.V.

BioAmber Inc.

Myriant Corporation

Kawasaki Kasei Chemicals Ltd

Mitsui & Co., Ltd

Corbion N.V.

Nippon Shokubai Co., Ltd.

Mitsubishi Chemical Group Corporation

Report Scope:

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

Bio-Succinic Acid Market, By Application:

BDO

Polyester Polyols

Plasticizers

PBS/PBST

Alkyd Resins

Polymers and Esters

Solvents and Coatings

Others

Bio-Succinic Acid Market, By End User:

Food and Beverages

Pharmaceuticals

Personal Care and Cosmetics

Others

Bio-Succinic Acid 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 presents in the Global Bio-Succinic Acid Market.

Available Customizations:

Global Bio-Succinic Acid Market report with the given market data, Tech Sci 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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