

# Polyethylene Furanoate Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Plant-Based, Bio-based), By Application (Bottles, Films, Fibers, Others), By Region & Competition, 2019-2029F

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## Abstracts

Global Polyethylene Furanoate Market was valued at USD 25.61 Million in 2023 and is anticipated to project a steady growth in the forecast period with a CAGR of 3.64% through 2029. Polyethylene Furanoate (PEF) is an emerging sustainable and bio-based polymer with potential applications in packaging, textiles, and various other industries. The PEF market is gaining attention as it offers a promising alternative to petroleum-derived plastics, like PET (Polyethylene Terephthalate), with the added benefits of improved barrier properties and a reduced carbon footprint. As the demand for environmentally friendly materials grows, the PEF market is expected to witness significant expansion, positioning it as an important player in the future of bioplastics.

### Key Market Drivers

#### Increase in Utilization of Polyethylene Furanoate in Textile Industry

Polyethylene furanoate fibers are derived from polyethylene furanoate bottles and are utilized in the manufacturing of 100% biobased t-shirts. PEF can be effectively melted and spun, transformed into textured fibers, and used in various fabric production processes such as weaving, knitting, and braiding using the current equipment commonly used for PET processing. The escalating utilization of Polyethylene Furanoate (PEF) in the textile industry is serving as a pivotal driver for the expansion of the Global Polyethylene Furanoate Market. PEF, a bio-based polymer derived from renewable sources such as plant-based sugars, stands out for its exceptional properties

that align with the textile sector's sustainability goals and consumer demands for eco-friendly products. As environmental concerns mount and regulatory pressures intensify to reduce the carbon footprint of manufacturing processes, PEF emerges as a viable alternative to conventional petrochemical-based polymers like polyethylene terephthalate (PET).

One of the key factors propelling the adoption of PEF in the textile industry is its superior performance attributes. PEF boasts excellent mechanical strength, thermal stability, and barrier properties, making it well-suited for a wide range of textile applications, including fibers, fabrics, and packaging materials. Its ability to withstand high temperatures and harsh chemical environments enhances the durability and longevity of textile products, appealing to both manufacturers and end-users alike.

The inherent biodegradability of PEF sets it apart from traditional synthetic polymers, addressing growing concerns over plastic pollution and waste management. As consumers become increasingly conscious of the environmental impact of their purchasing decisions, textiles made from PEF offer a sustainable solution that aligns with their values and preferences. This eco-friendly characteristic of PEF not only reduces the environmental burden associated with textile production but also contributes to the circular economy by enabling the recycling and reuse of end-of-life textile products.

### Growing Demand for PEF-derived Materials in the Packaging Sector

Polyethylene Furanoate is made completely from vegetable raw substances and is likewise recyclable. It is taken into consideration to be the packaging fabric of the future, especially for meals and beverages. For instance, utilizing PEF and timber fibers promoted by the Carlsberg Group is the 'Eco-friendly Fiber Bottle' model appropriate for storing beer. Avantium's PEF is well-suited for multilayer packaging solutions, in addition to monolayer PEF bottles. Multilayer bottles present a viable option in situations where the longevity of the product cannot be assured solely through the use of monolayer packaging. PEF has the potential to serve as an alternative to barrier materials such as polyamides. PEF provides an effective method of blocking O<sub>2</sub> and CO<sub>2</sub> without negatively impacting its performance. In this regard, PEF has the potential to significantly play a role in decreasing the environmental impact of packaging. By increasing the durability of goods, solutions can be implemented to decrease product weight, and enhance the recyclability of the packaging used. The burgeoning demand for Polyethylene Furanoate (PEF)-derived materials within the packaging sector is serving as a primary driver behind the rapid growth of the global Polyethylene

Furanoate Market. PEF, an innovative bio-based polyester, is increasingly gaining traction as a sustainable alternative to traditional petroleum-based plastics like polyethylene terephthalate (PET). The packaging industry, in particular, is witnessing a significant shift towards PEF due to its superior characteristics, including enhanced barrier properties, high mechanical strength, and excellent transparency. These properties make PEF an ideal choice for various packaging applications, ranging from bottles and films to food packaging and beverage containers.

PEF's exceptional barrier properties make it well-suited for extending the shelf life of packaged products, thereby reducing food waste and enhancing product freshness. This characteristic is particularly advantageous in the food and beverage industry, where maintaining product quality and safety is paramount. PEF's compatibility with existing recycling infrastructure further enhances its appeal, as it allows for seamless integration into current recycling processes without significant modifications.

### Growth in Research and Development Based on Polyethylene Furanoate

In recent times, research on PEF has also shifted towards the advancement of (nano)materials, which further enhances and controls thermomechanical properties of the material. However, only a limited number of nanofillers have been utilized so far in the creation of PEF nanomaterials, specifically carbon nanotubes, montmorillonite, silver nanowires, and nanocellulose. Essentially, all these studies aim to augment the thermomechanical capabilities of the resultant materials, to develop flexible optoelectronic devices, and create effective photocatalysts for the removal of anti-inflammatory/analgesic drugs. According to a recent study conducted in 2018, researchers successfully developed transparent flexible films that show conductive property by combining PEF with silver nanowires (AgNWs). The strong interaction with AgNWs greatly improved the adhesion of the grown AgNWs, resulting in superior flexibility and resistance to peeling compared to the PET substrate. These conductive PEF/AgNWs films were successfully utilized in the production of flexible organic thin-film transistors and organic photovoltaic (OPV) devices. The OPV device achieved a power conversion efficiency of 6.7%, which surpasses the efficiency of devices based on Indium Tin oxide (ITO)/poly (ethylene naphthalate) (PEN). Scientists noted a few technical challenges when it comes to effectively recycling PEF. One of these obstacles related to the fact that PEF and PET are comparable and that they can possess a similar look and/or physicochemical characteristics. Considering this, the European PET Bottle Platform (EBPB)'s Technical Committee carried out an assessment of the impact of PEF on the PET recycling process, and the utilization of near-infrared (NIR) sorting machinery to differentiate between the two polymers. Results of this assessment

revealed that a PEF contamination level of 2% or less in a PET recycling process does not have any adverse effects on the haze, color, or other characteristics of the recycled PET. It was stated that the inclusion of up to 5% PEF in PET/PEF mixtures, which were extruded into standard tensile bars, did not have a noteworthy impact on the tensile behavior.

## Partnerships & Collaborations Between Biotech Firms & Packaging Companies

Partnerships and collaborations between biotech firms and packaging companies are playing a pivotal role in increasing the demand for Polyethylene Furanoate (PEF) globally. PEF is a bio-based alternative to traditional petroleum-based plastics, offering enhanced performance characteristics and environmental sustainability. Biotech firms specializing in the development of bio-based materials are partnering with packaging companies to leverage their expertise in manufacturing and distribution. These collaborations enable the scaling up of PEF production and facilitate its integration into various packaging applications, ranging from bottles to films and food containers. By combining the innovative research and development efforts of biotech firms with the market reach and infrastructure of packaging companies, PEF is gaining traction as a viable alternative to conventional plastics. Increasing consumer awareness and regulatory initiatives aimed at reducing plastic waste and carbon emissions are further driving the demand for sustainable packaging solutions like PEF. As a result, partnerships and collaborations between biotech firms and packaging companies are instrumental in accelerating the adoption of PEF globally, addressing the growing need for environmentally friendly packaging materials in diverse industries.

## Key Market Challenges

### High Production Costs Compared to Conventional PET Plastics

The demand for Polyethylene Furanoate (PEF) globally faces challenges due to its high production costs compared to conventional PET plastics. While PEF offers superior performance characteristics and environmental sustainability as a bio-based alternative to traditional petroleum-based plastics, its production involves more complex processes and higher raw material costs. As a result, PEF is typically more expensive to manufacture than PET plastics, which have established supply chains and production infrastructure. The higher production costs of PEF translate to elevated prices for end-users, including manufacturers and consumers, making it less competitive in price-sensitive markets. Industries reliant on large-scale production volumes, such as packaging and consumer goods, may be hesitant to adopt PEF due to its higher cost

per unit. Consequently, despite its potential advantages, the high production costs of PEF pose a significant barrier to its widespread adoption, limiting its demand globally. Efforts to optimize production processes, scale up manufacturing capacities, and develop cost-effective production technologies are essential to address these challenges and enhance the competitiveness of PEF in the marketplace, thereby stimulating its demand on a global scale.

### Lack Of Widespread Consumer & Manufacturer Awareness

The lack of widespread consumer and manufacturer awareness is a significant factor contributing to the decrease in demand for Polyethylene Furanoate (PEF) globally. While PEF offers compelling advantages such as sustainability, renewability, and superior performance compared to traditional petroleum-based plastics, many consumers and manufacturers remain unaware of its existence and benefits. The limited awareness stems from various factors, including insufficient marketing efforts, inadequate education about sustainable materials, and the dominance of established plastic alternatives like PET. The complexity of supply chains and production processes for PEF may further obscure its presence in the market. As a result, consumers may default to familiar options, while manufacturers may hesitate to invest in new materials without a clear understanding of their advantages and compatibility with existing production systems. Without widespread awareness and understanding of PEF's benefits, its demand is stifled, hindering its market penetration and adoption across industries. Efforts to raise awareness through targeted marketing campaigns, educational initiatives, and collaboration with industry stakeholders are crucial to address this challenge and drive the demand for PEF globally, positioning it as a viable and sustainable alternative to traditional plastics.

### Key Market Trends

#### Development in the 3D Printing Industry Requiring Sustainable Materials

The burgeoning development within the 3D printing industry, coupled with an increasing focus on sustainability, is propelling the demand for Polyethylene Furanoate (PEF) on a global scale. As 3D printing technologies advance, there is a growing need for sustainable materials that can meet the requirements of additive manufacturing processes while minimizing environmental impact. PEF, as a bio-based alternative to traditional petroleum-based plastics, offers exceptional sustainability credentials, including renewable sourcing and biodegradability. Its unique properties, such as high strength, durability, and thermal stability, make it an attractive choice for various 3D



printing applications, ranging from prototyping to end-use parts production. The versatility of PEF enables its utilization across diverse industries, including aerospace, automotive, healthcare, and consumer goods. As environmental concerns surrounding plastic pollution intensify and regulatory pressures mount, the demand for sustainable materials like PEF is expected to escalate. Consequently, the development in the 3D printing industry is driving the demand for PEF globally, as manufacturers seek eco-friendly alternatives to meet the evolving needs of sustainable production practices and consumer preferences.

### Demand for High-Performance Materials in The Automotive Industry

The demand for high-performance materials in the automotive industry is fueling a surge in demand for Polyethylene Furanoate (PEF) on a global scale. As automotive manufacturers strive to enhance the efficiency, durability, and sustainability of their vehicles, there is a growing need for advanced materials that can meet stringent performance requirements while reducing environmental impact. PEF, a bio-based alternative to traditional petroleum-based plastics, offers a compelling solution with its exceptional mechanical properties, including high strength, stiffness, and heat resistance. These properties make PEF well-suited for a wide range of automotive applications, such as lightweight components, interior trim, and under-the-hood parts. PEF's renewable sourcing and biodegradability align with the automotive industry's sustainability goals, driving its adoption as a preferred material choice. As regulatory mandates and consumer preferences increasingly prioritize eco-friendly materials, the demand for PEF in the automotive sector is poised for substantial growth. Collaborations between automotive manufacturers and PEF suppliers to develop innovative applications and scale up production further underscore the rising prominence of PEF as a high-performance material in the automotive industry, driving its global demand.

### Segmental Insights

#### Type Insights

Based on the Type, the global polyethylene furanoate (PEF) market is experiencing a significant surge in demand for bio-based products. This growing trend is primarily fuelled by the increasing consumer preference for sustainable and environmental-friendly materials that align with their values. The rise in popularity of bio-based PEF, in particular, can be attributed to its lower carbon footprint and the potential it holds for reducing greenhouse gas emissions compared to plant-based alternatives. As

companies and consumers alike become more conscious of the environmental impact of packaging, there is a notable inclination towards adopting bio-based PEF as part of a collective effort to embrace more sustainable packaging solutions. This shift towards bio-based materials not only satisfies the demand for eco-friendly alternatives but also contributes to the larger goal of creating a greener and more sustainable future.

## Regional Insights

The Asia-Pacific region dominated in the Global Polyethylene Furanoate (PEF) Market, showcasing its strong position in the sustainable packaging industry. This dominance is primarily driven by the rapidly growing demand for eco-friendly packaging solutions, particularly in countries like China and India, where the awareness of environmental issues among consumers is on the rise. In China, the government's push towards a greener economy and stricter regulations on plastic waste management have fueled the demand for PEF, as it offers a more sustainable alternative to traditional packaging materials. Similarly, in India, the increasing consumer preference for eco-friendly products, coupled with the government's initiatives to reduce plastic pollution, has created a significant market opportunity for PEF manufacturers.

The Asia-Pacific region benefits from its competitive manufacturing costs and progressive industrial policies, further solidifying its leading position in the PEF market. The region's robust infrastructure and well-established supply chains enable efficient production and distribution of PEF products, meeting the growing demand from both domestic and international markets. With its commitment to sustainability and continuous innovation, the Asia-Pacific region is well-positioned to shape the future of the global PEF industry. Companies in the region are investing in research and development to improve the performance and versatility of PEF, exploring new applications beyond packaging, such as textiles and automotive components. This forward-thinking approach, combined with the region's market dominance, makes it a key player in driving the adoption of PEF as a viable alternative to conventional plastics worldwide.

## Key Market Players

Alpla Werke Alwin Lehner GmbH & Co KG.

AVA Biochem AG

Avantium N.V.

Corbion N.V.

Mitsui & Co., Ltd.

Swire Pacific Ltd.

Toyobo Co., Ltd.

Toyo Seikan Group Holdings, Ltd.

Sulzer Ltd.

Toray Industries Inc.

#### Report Scope:

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

#### Polyethylene Furanoate Market, By Type:

Plant-based

Bio-based

#### Polyethylene Furanoate Market, By Application:

Bottles

Films

Fibres

Others

#### Polyethylene Furanoate 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 Polyethylene Furanoate Market.

### Available Customizations:

Global Polyethylene Furanoate 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).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL POLYETHYLENE FURANOATE MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value & Volume
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Plant-based, Bio-based)
  - 5.2.2. By Application (Bottles, Films, Fibres, Others)
  - 5.2.3. By Region
  - 5.2.4. By Company (2023)

### 5.3. Market Map

## 6. NORTH AMERICA POLYETHYLENE FURANOATE MARKET OUTLOOK

### 6.1. Market Size & Forecast

#### 6.1.1. By Value & Volume

### 6.2. Market Share & Forecast

#### 6.2.1. By Type

#### 6.2.2. By Application

#### 6.2.3. By Country

### 6.3. North America: Country Analysis

#### 6.3.1. United States Polyethylene Furanoate Market Outlook

##### 6.3.1.1. Market Size & Forecast

###### 6.3.1.1.1. By Value & Volume

##### 6.3.1.2. Market Share & Forecast

###### 6.3.1.2.1. By Type

###### 6.3.1.2.2. By Application

#### 6.3.2. Mexico Polyethylene Furanoate Market Outlook

##### 6.3.2.1. Market Size & Forecast

###### 6.3.2.1.1. By Value & Volume

##### 6.3.2.2. Market Share & Forecast

###### 6.3.2.2.1. By Type

###### 6.3.2.2.2. By Application

#### 6.3.3. Canada Polyethylene Furanoate Market Outlook

##### 6.3.3.1. Market Size & Forecast

###### 6.3.3.1.1. By Value & Volume

##### 6.3.3.2. Market Share & Forecast

###### 6.3.3.2.1. By Type

###### 6.3.3.2.2. By Application

## 7. EUROPE POLYETHYLENE FURANOATE MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value & Volume

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Application

#### 7.2.3. By Country

### 7.3 Europe: Country Analysis

- 7.3.1. France Polyethylene Furanoate Market Outlook
  - 7.3.1.1. Market Size & Forecast
    - 7.3.1.1.1. By Value & Volume
  - 7.3.1.2. Market Share & Forecast
    - 7.3.1.2.1. By Type
    - 7.3.1.2.2. By Application
- 7.3.2. Germany Polyethylene Furanoate Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value & Volume
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Type
    - 7.3.2.2.2. By Application
- 7.3.3. United Kingdom Polyethylene Furanoate Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value & Volume
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Type
    - 7.3.3.2.2. By Application
- 7.3.4. Italy Polyethylene Furanoate Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value & Volume
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Application
- 7.3.5. Spain Polyethylene Furanoate Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value & Volume
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Type
    - 7.3.5.2.2. By Application

## **8. ASIA-PACIFIC POLYETHYLENE FURANOATE MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value & Volume
- 8.2. Market Share & Forecast
  - 8.2.1. By Type
  - 8.2.2. By Application
  - 8.2.3. By Country

- 8.3. Asia-Pacific: Country Analysis
  - 8.3.1. China Polyethylene Furanoate Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value & Volume
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Type
      - 8.3.1.2.2. By Application
  - 8.3.2. India Polyethylene Furanoate Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value & Volume
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Type
      - 8.3.2.2.2. By Application
  - 8.3.3. South Korea Polyethylene Furanoate Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value & Volume
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Type
      - 8.3.3.2.2. By Application
  - 8.3.4. Japan Polyethylene Furanoate Market Outlook
    - 8.3.4.1. Market Size & Forecast
      - 8.3.4.1.1. By Value & Volume
    - 8.3.4.2. Market Share & Forecast
      - 8.3.4.2.1. By Type
      - 8.3.4.2.2. By Application
  - 8.3.5. Australia Polyethylene Furanoate Market Outlook
    - 8.3.5.1. Market Size & Forecast
      - 8.3.5.1.1. By Value & Volume
    - 8.3.5.2. Market Share & Forecast
      - 8.3.5.2.1. By Type
      - 8.3.5.2.2. By Application

## **9. SOUTH AMERICA POLYETHYLENE FURANOATE MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value & Volume
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Application



- 9.2.3. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Polyethylene Furanoate Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value & Volume
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type
      - 9.3.1.2.2. By Application
  - 9.3.2. Argentina Polyethylene Furanoate Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value & Volume
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type
      - 9.3.2.2.2. By Application
  - 9.3.3. Colombia Polyethylene Furanoate Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value & Volume
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Type
      - 9.3.3.2.2. By Application

## **10. MIDDLE EAST AND AFRICA POLYETHYLENE FURANOATE MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value & Volume
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application
  - 10.2.3. By Country
- 10.3. MEA: Country Analysis
  - 10.3.1. South Africa Polyethylene Furanoate Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value & Volume
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Application
  - 10.3.2. Saudi Arabia Polyethylene Furanoate Market Outlook
    - 10.3.2.1. Market Size & Forecast

- 10.3.2.1.1. By Value & Volume
- 10.3.2.2. Market Share & Forecast
  - 10.3.2.2.1. By Type
  - 10.3.2.2.2. By Application
- 10.3.3. UAE Polyethylene Furanoate Market Outlook
  - 10.3.3.1. Market Size & Forecast
    - 10.3.3.1.1. By Value & Volume
  - 10.3.3.2. Market Share & Forecast
    - 10.3.3.2.1. By Type
    - 10.3.3.2.2. By Application

## **11. MARKET DYNAMICS**

- 11.1. Drivers
- 11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. PESTLE ANALYSIS**

## **14. PORTER'S FIVE FORCES ANALYSIS**

- 14.1. Competition in the Industry
- 14.2. Potential of New Entrants
- 14.3. Power of Suppliers
- 14.4. Power of Customers
- 14.5. Threat of Substitute Product

## **15. COMPETITIVE LANDSCAPE**

- 15.1. Alpla Werke Alwin Lehner GmbH & Co KG.
  - 15.1.1. Business Overview
  - 15.1.2. Company Snapshot
  - 15.1.3. Products & Services
  - 15.1.4. Financials (As Reported)

- 15.1.5. Recent Developments
- 15.1.6. Key Personnel Details
- 15.1.7. SWOT Analysis
- 15.2. AVA Biochem AG
- 15.3. Avantium N.V.
- 15.4. Corbion N.V.
- 15.5. Mitsui & Co., Ltd.
- 15.6. Swire Pacific Ltd.
- 15.7. Toyobo Co., Ltd.
- 15.8. Toyo Seikan Group Holdings, Ltd.
- 15.9. Sulzer Ltd.
- 15.10. Toray Industries Inc.

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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