

Biorefinery Products: Global Markets

Market Research Report | 2022-10-20 | 440 pages | BCC Research

AVAILABLE LICENSES:

- Single User License \$5500.00
- 2-5 Users License \$6600.00
- Site License \$7920.00
- Enterprise License \$9504.00

Report description:

Description

Report Scope:

This research report quantifies the two categories of bioenergetic and non-bioenergetic bioproducts into seven major product segments: bio-derived chemicals, biofuels, pharmaceuticals (biodrugs and herbal/botanicals), biocomposite materials, biopolymers/bioplastics, biogas and biopower.

The report is divided into 16 chapters.

- Chapter Two analyzes demand by category, with a forecast to 2027.
- Chapter Three presents an overview that defines and quantifies biorefinery products and assesses market trends and categories/segments with a forecast to 2027.
- Chapter Four presents the history, opportunity and penetration of bio-products with a forecast to 2027.
- Chapter Five presents the impacts of COVID-19 and the Russia-Ukraine war on various end-use industries globally.
- Chapter Six presents the demand for bioenergetic bioproducts and analyzes the market for biofuels, biogas and wood pellets, with regional breakdowns and forecasts to 2027.
- Chapter Seven presents the demand for non-bioenergetic bioproducts and analyzes the market for chemicals, pharmaceuticals and biomaterials. These are quantified by type, with regional breakdowns and forecasts to 2027.
- Chapter Eight considers the applications of bioproducts and quantifies the demand in up to 11 key markets, offering forecasts to 2027.
- Chapter Nine considers the technology and quantifies demand by type of technology used for the conversion of biomass to bioproducts, offering estimates for 2027.
- Chapter Ten presents the region wise market for biorefinery products.
- Chapter Eleven discusses product development in the chemical, pharmaceutical, materials, power and fuel sectors, which will

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

enable utilization of the biomass that Earth's biology produces every year.

- Chapter Twelve presents an analysis of the industry structure, showing how each market segment will interact over the next five years to 2027, including the macroeconomic factors that affect the global economy.
- Chapter Thirteen presents the international aspects, including market leadership. It also quantifies international trade in bioproducts with a forecast for 2027.
- Chapter Fourteen presents the market shares of the major companies involved in the manufacture of bio-based products and discusses these companies and products.
- Chapter Fifteen analyzes the regulatory environment of the biorefinery industry.
- Chapter Sixteen presents company product profiles and identifies the various companies involved in manufacturing these products.

A negative economic outlook has been assumed in all the segments for 2020 due to COVID-19. A negative impact due to the Russia-Ukraine war that started in February 2022 has also been considered in this report. The growing economies are assumed to attract key companies in the market and increase consumer spending.

Report Includes:

- 124 data tables and 109 additional tables
- A comprehensive overview and up-to-date analysis of the global markets for biorefinery products
- Analyses of the global market trends, with market revenue for 2021, estimates for 2022, and projections of compound annual growth rates (CAGRs) through 2027
- Estimation of the actual market size and market forecast for biorefinery products in value and volumetric terms, and their corresponding market share analysis based on product, technology, end-use application, and geographic region
- Highlights of the current and future market potential for two main types of biorefinery products (energetic/non-energetic), along with a detailed analysis of the competitive environment, industry outlook, and opportunities and penetration of bio-products
- Discussion of the value chain of basic products and the structure of the biorefinery industry and its interaction with the fossil-based industry
- A critical evaluation of the current status of commercial biorefinery markets and how recent environmental legislation and breakthroughs in technology will make the use of bio-based products competitive with established fossil-based platforms
- Holistic review of the effects of Covid-19 pandemic and the Russia-Ukraine war on the global biorefinery industry
- Updated information on the technology landscape of biorefinery products, conversion technologies, and number of registered patents for bioproducts (biochemicals, ethanol, biodiesel and biological materials)
- Insight into the end-users of biorefinery products, and assessment of the product technology development, and international trade and regulations within the biorefinery industry
- Descriptive company profiles of the market leading players, including Abengoa, ADM, Amyris, BASF, BP plc, Chevron Corp., Neste, and Petrobras

Executive Summary

Summary:

BCC Research estimates that the global demand for biorefinery products will increase at a CAGR of REDACTED% over the next five years from 2022 to reach \$REDACTED in 2027. There are two key distinct categories of biorefinery products: bioenergetic and non-bioenergetic biorefinery products.

Demand for bioenergetic biorefinery products will increase at a CAGR of REDACTED% to reach \$REDACTED in 2027, up from an estimated \$REDACTED in 2022. This growth will result in a market penetration rate of REDACTED% in 2027, up from an estimated

penetration of REDACTED% in 2020. Many bioenergetic biorefinery products are now going commercial, with commercially available production technologies (e.g., direct combustion in stoker boilers, low-percentage co-firing, municipal solid waste incineration with combined heat and power, dry/wet milling, fermentation and esterification). Bioenergetic biorefinery products can therefore help countries meet their policy goals for secure, reliable and affordable clean energy to expand access and promote rural development.

Demand for non-bioenergetic biorefinery products, which include chemicals, pharmaceuticals, and materials, should reach \$REDACTED in 2027, from an estimated \$REDACTED in 2022, corresponding to a CAGR of REDACTED%. These products continue to penetrate the clothing, pharmaceuticals, plastic films, carpeting, containers, composite panels, sorbents, solvents, adhesives and insulation markets, which are at well-established stages of development. Pharmaceuticals, coatings, plastic films, containers, adhesives, insulation, wood waste products and composite panels are expected to represent a substantial share in the non-bioenergetic bio-based industry.

Table of Contents:

Table of Contents

Chapter 1 Introduction

1.1 Market Definition

1.2 Study Goals and Objectives

1.3 Reasons for Doing This Study

1.4 Intended Audience

1.5 What's New in This Update?

1.6 Scope of Report

1.7 Information Sources

1.8 Methodology

1.8.1 Currency

1.8.2 Unit Considered

1.9 Geographic Breakdown

1.10 Analyst's Credentials

1.11 BCC Custom Research

1.12 Related BCC Research Reports

Chapter 2 Summary and Highlights

Chapter 3 Market Overview

3.1 Introduction

3.1.1 Understanding Biorefinery Products

3.1.2 Understanding Biomass

3.2 Global Biomass Market Overview

3.3 Overview of Demand for Nonfood Biomass

3.3.1 Biomass Use for Energy

3.3.2 Biomass Use for Materials (Non-energy)

3.4 Overview of Global Biomass Demand by Use

3.4.1 Understanding Bioproducts and its Categorization

3.5 Global Market for Bioproducts

3.5.1 Global Market for Identified Bioenergetic Products

3.5.2 Global Market for Identified Non-bioenergetic Products

3.6 Overview of Bio-based Replacement of Petro-Based Products

3.7 Overview of the Bioproduct-Oriented Value Chain

3.8 Overview of the Market Segmentation of Bioproducts

- 3.9 Where Bioderived Products Fit in the Global Economy
 - 3.10 Important Indications and Developments in the Bioderived Product Industry
 - 3.11 Global Investment in the Biorefining Industry
 - 3.12 Bio-based Product Terminology
 - 3.12.1 Biopolymers/Biodegradable Polymers
 - 3.12.2 Environmental Issues
 - 3.12.3 Bio-based Products
 - 3.12.4 Degradable and Biodegradable
 - 3.12.5 Compostable vs. Biodegradable
 - 3.13 Bio-based Products in the Chemical Industry
 - 3.13.1 Bio-based Chemical Products
 - 3.14 Factors Driving Market Growth
 - 3.14.1 Climate Change and Environment
 - 3.14.2 Innovations
 - 3.14.3 Corporate Sustainability
 - 3.14.4 Growing Industrial Activities in Emerging Economies
 - 3.14.5 Growth in Industrial and Building Automation Technology
 - 3.14.6 Growth in Automotive Industry in Emerging Economies
 - 3.14.7 Growing Demand for Processed Food in Emerging Economies
 - 3.14.8 Increasing Per Capita Income of Consumers
 - 3.14.9 Shift in Consumer Preference from Conventional Packaging to Eco-Friendly Packaging Materials
 - 3.14.10 Favorable Government Policies towards Green, Ecofriendly and Biodegradable Products
 - 3.14.11 Technological Emergence and Development of New Bio-based and Renewable Raw Materials
 - 3.15 Opportunities in the Market
 - 3.15.1 Rising Awareness of Using Bio-based Lubricants
 - 3.15.2 Rising Demand for Renewable Energy
 - 3.15.3 Rising Industrial Growth in BRIC Countries
 - 3.16 Industry Outlook
 - 3.16.1 GDP Trends and Forecast of Major Economies
 - 3.16.2 Lockdowns and Economic Activity
 - 3.16.3 Crude Oil
 - 3.16.4 Natural Gas
- Chapter 4 History and Market Penetration of Bioproducts
- 4.1 History
 - 4.1.1 Bioethanol
 - 4.1.2 Biodiesel
 - 4.1.3 Herbal/Botanical
 - 4.1.4 Biodrugs
 - 4.1.5 Wood Pellets
 - 4.1.6 Biomaterials and Biocomposites
 - 4.2 Bioproducts Market Opportunity
 - 4.3 Bioproduct Market Penetration
 - 4.3.1 Bioenergetic Bioproduct Market Penetration
 - 4.3.2 Non-bioenergetic Products Market Penetration
- Chapter 5 Impact of COVID-19 and Russia-Ukraine War
- 5.1 Impact of COVID-19
 - 5.1.1 Disruption in Major Industries

- 5.1.2 Chemical Industry
- 5.1.3 Metal and Mining Industry
- 5.1.4 HVAC Industry
- 5.1.5 Automotive Industry
- 5.1.6 Construction Industry
- 5.1.7 Oil and Gas Industry
- 5.2 Impact of Russia-Ukraine War
- 5.2.1 Biofuel Industry
- 5.2.2 Chemical Industry
- 5.2.3 Metal and Mining Industry
- 5.2.4 HVAC Companies
- 5.2.5 Automotive Industry
- 5.2.6 Construction Industry
- 5.2.7 Oil and Gas Industry
- Chapter 6 Global Market for Bioenergetic Products
- 6.1 Bioenergetic Products
- 6.2 Global Demand for Bioenergetic Products by Physical State/Type
- 6.2.1 Liquid Bioproducts
- 6.3 Advanced Biofuels
- 6.3.1 Global Demand for Bioenergetic Advanced Liquid Bioproducts
- 6.3.2 First-Generation and Advanced Bioenergetic Liquid Bioproducts Production per Unit of Land Area
- 6.4 U.S. Environmental Protection Agency's Final Rule
- 6.5 National Biofuel Blend Wall
- 6.6 State and Provincial Biofuel Blend Mandates
- 6.6.1 United States
- 6.6.2 EU-28
- 6.6.3 Brazil
- 6.7 Plant Oil Biofuel
- 6.7.1 Global Demand for Plant Oil Biofuel
- 6.7.2 Straight Vegetable Oil
- 6.7.3 Plant Oil-Diesel Blends as Fuel
- 6.7.4 Hydrotreated Oils
- 6.7.5 Bio-Oil and Other
- 6.8 Solid Bioenergetic Products
- 6.8.1 Demand for Solid Bioenergetic Products by Type
- 6.8.2 Pellets, Woody Chips and Briquettes
- 6.8.3 Charcoal, Industrial and Municipal Solid Waste (CIMSW)
- 6.9 Gaseous Bioenergetic Products
- 6.9.1 Global Demand for Gaseous Bioenergetic Products
- Chapter 7 Global Market for Non-bioenergetic Products
- 7.1 Non-bioenergetic Products
- 7.1.1 Bioderived Chemicals
- 7.1.2 Fermentation-Derived Fine Chemicals Products
- 7.1.3 Bioderived Fine (Specialty) Chemicals
- 7.1.4 Pharmaceutical Ingredients Produced by Biotransformation
- 7.1.5 Phytochemicals
- 7.1.6 Biodrugs and Herbals/Botanicals

7.1.7 Biodrugs

7.1.8 Bioplastics/Biopolymers

Chapter 8 Global Market for Biorefinery Products by End Use

8.1 Introduction

8.2 Bioproduct End Uses

8.2.1 Industrial

8.2.2 Manufacturing

8.2.3 Transportation

8.2.4 Flame Retardants

8.2.5 Safe Food Supply

8.2.6 Environment

8.2.7 Communications

8.2.8 Construction/Housing

8.2.9 Recreation

8.2.10 Agriculture

8.2.11 Health and Hygiene

8.2.12 Energy

Chapter 9 Technology

9.1 Demand for Bioproducts by Type of Technology Generation

9.1.1 First-Generation Bioproducts

9.1.2 Second-Generation Bioproducts

9.1.3 Third-Generation Bioproducts

9.1.4 Fourth-Generation Bioproducts

9.1.5 Fifth-Generation Bioproducts

9.2 Demand for Bioproducts by Type of Conversion Technology

9.2.1 Thermochemical Conversion Technology

9.2.2 Physicochemical Technology

9.2.3 Biological Conversion Technology

9.2.4 Hybrid Technology Platform

9.3 Product Technology Development

9.4 Patent Evaluation

Chapter 10 Global Market for Biorefinery Products by Region

10.1 Introduction

10.2 Global Deployment of Biorefineries

10.3 Global Market for Biorefinery Products, by Region

10.3.1 Global Market Volumes of Advanced Bioenergetic Liquid Production, by Region

10.3.2 Global Demand for Charcoal, Industrial and Municipal Solid Waste, by Region

10.3.3 Pellets, Woody Chips and Briquettes

10.3.4 Global Market Volumes of Pellets, Woody Chips and Briquettes (PWB), by Region

10.3.5 Global Demand for Gaseous Bioenergetic Products, by Region

10.4 Global Market for Non-bioenergetic Products

10.4.1 Global Market for Bioderived Chemicals, by Region

10.5 Biodrugs and Herbals/Botanicals

10.5.1 Global Demand for Biodrugs and Herbals/Botanicals, by Region

10.6 Global Production Capacity for Bio-based, Potentially Bio-based and Biodegradable Plastics, by Region

10.6.1 North America

10.6.2 Europe

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.6.3 Asia-Pacific

10.6.4 South America

10.7 Demand for Bio-based Composites, by Region

10.7.1 North America

10.7.2 European Union

10.7.3 Asia-Pacific

10.7.4 South America

10.7.5 ROW

Chapter 11 Product Development

11.1 Biofuel Product Development

11.2 Bio-based Chemical Product Development

11.3 Bio-based Plastics/Polymer Product Development

11.4 Biocomposite Product Development

11.5 Bio-based Medicine/Healthcare Product Development

11.6 Biogas Product Development

11.7 Wood Pellet/Chip/Log Product Development

Chapter 12 Industry Structure and Competitive Rates

12.1 Biorefinery Industry Activity Sectors

12.2 Economics of Biorefineries

12.3 Pathways for the Provision of Bio-based Products

12.4 Value Addition/Creation/Unlocking Through Feedstock Control

12.4.1 Upstream: Controlling Feedstock Costs

12.4.2 Midstream: Value Creation, Value Unlocking and Value Addition

12.4.3 Downstream

12.5 Sales, Distribution and Supporting Industries

12.6 Employment, Working Conditions and Economic Impact

12.7 Economic Impact of Biorefinery

12.8 Major Trends

12.8.1 Strategic Investments, Partnerships, Alliances and Networks

12.8.2 Strategic Companies Investing in Biogreen Technology

12.8.3 Major Blue Chip Company Strategic Partnerships

12.9 Chemical Industry Partnerships

12.10 Strategic Joint Ventures

12.11 Strategic Alliances in Bio-based Chemicals

12.12 Network of Partners

Chapter 13 International Aspect

13.1 Global Commodity Prices

13.1.1 Crude Oil

13.1.2 Biofuels Feedstock

13.1.3 Natural Gas

13.1.4 Liquefied Natural Gas

13.1.5 Metals and Minerals

13.2 Global Population

13.2.1 North America

13.2.2 Asia-Pacific

13.2.3 Middle East and Africa

13.2.4 Europe

- 13.3 Global R&D Spending in Countries with Strong Biorefining Industries
- 13.4 Leading Countries in Key Technology Areas Where Biorefining Products are Applied
 - 13.4.1 United States
 - 13.4.2 EU
 - 13.4.3 China
 - 13.4.4 Japan
 - 13.4.5 South Korea
 - 13.4.6 ROW
- 13.5 International Currency Exchange Rates
- 13.6 International Trade in Key Bioproducts
 - 13.6.1 Liquid Biofuels
 - 13.6.2 Grains
 - 13.6.3 Wood Pellets
 - 13.6.4 Essential Oils
- Chapter 14 Market Share
 - 14.1 Bioethanol
 - 14.1.1 Archer Daniels Midland
 - 14.1.2 Green Plains Renewable Energy
 - 14.1.3 Poet
 - 14.1.4 Valero Energy Corp.
 - 14.1.5 Cosan
 - 14.2 Biodiesel
 - 14.2.1 Neste Oil
 - 14.2.2 Dynoil LLC
 - 14.2.3 Brazil Eco Energia
 - 14.2.4 Dominion Energy Services LLC
 - 14.2.5 SE Energy
 - 14.2.6 Menlo Energy LLC
 - 14.2.7 Imperium Renewables
 - 14.2.8 Louis Dreyfus
 - 14.2.9 Canadian Green Fuels
 - 14.2.10 Others
 - 14.3 Glycerol
 - 14.4 Biotechnology Company Shares
 - 14.5 Chemicals and Materials
 - 14.5.1 BASF
 - 14.5.2 Sinopec
 - 14.5.3 Dow Chemical
 - 14.5.4 SABIC
 - 14.5.5 ExxonMobil
 - 14.6 2022 Capital Investment, by Chemical Companies
 - 14.6.1 Dow Chemicals
 - 14.6.2 BASF
 - 14.6.3 Ashland Inc.
 - 14.6.4 LyondellBasell
 - 14.7 Hydroprocessed Esters Fatty Acids (HEFA): Chemicals, Capital Spending, R&D Spending and Shares
 - 14.7.1 Neste Oil

- 14.7.2 Others
- 14.8 Bio-Oil Production
- 14.8.1 KiOR
- 14.8.2 Others
- 14.9 Market Shares of Essential Oil Companies
 - 14.9.1 Frutarom
 - 14.9.2 Symrise
 - 14.9.3 Robertet
 - 14.9.4 Mane
 - 14.9.5 Givaudan
 - 14.9.6 Sensient F&F
 - 14.9.7 IFF
 - 14.9.8 T. Hasegawa
 - 14.9.9 Firmenich
 - 14.9.10 Huaboa International
 - 14.9.11 Takasago
- 14.10 2021 Market Share of Global Fragrance and Flavors Industry
- 14.11 Pharmaceutical Company Market Shares
 - 14.11.1 Pfizer Inc. (U.S.)
 - 14.11.2 Roche (Switzerland)
 - 14.11.3 Novartis AG (Switzerland)
- 14.12 Advanced Biofuel Market Shares
- 14.13 Biopolymer/Bioplastics
 - 14.13.1 NatureWorks
 - 14.13.2 Purac
 - 14.13.3 Dow Chemical
 - 14.13.4 Braskem
- 14.14 Pellets
 - 14.14.1 Enova Wood Pellet Group
 - 14.14.2 General Biofuels Georgia
 - 14.14.3 Fram Renewable Fuels
 - 14.14.4 Drax Group
 - 14.14.5 German Pellets
 - 14.14.6 Zilkha Biomass
 - 14.14.7 New Biomass Energy LLC
 - 14.14.8 Thermogen Industries
 - 14.14.9 2021 Scenario of Pellet Companies
- 14.15 Commercial Cellulosic Biofuel Company Shares
 - 14.15.1 Poet-DSM Advanced Biofuels LLC
 - 14.15.2 Abengoa Bioenergy
 - 14.15.3 DuPont
 - 14.15.4 Quad County Corn Processors
 - 14.15.5 Renewable Energy Group
 - 14.15.6 Yield 10 Bioscience Inc.
 - 14.15.7 EcoSynthetix Inc.

Chapter 15 Regulations, Legislation, Mandates, Policies and Incentives

15.1 Introduction

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

- 15.2 Regulations and Legislation
- 15.3 Mandates and Support Policies
- 15.4 U.S. Biofuels Targets Mandated, by EISA
- 15.5 Mandates Currently in Place in Other Countries
- 15.6 Key Policy Instruments in Selected Countries
- 15.7 Government Subsidies, Including Mandates for Liquid Biofuels Used in Transportation for Top Biofuel-Producing Countries
- 15.7.1 European Union
- 15.7.2 United States
- 15.7.3 Asia-Pacific
- 15.7.4 South America
- 15.7.5 Africa
- 15.8 Instruments and Approaches for the Sound Management of Chemicals and Materials
- 15.9 Stakeholder Initiatives
- 15.9.1 Policy Reactions to High Biofuel and Oil Prices
- Chapter 16 Company Profiles
- 16.1 Profiles of Top Companies
- ABENGOA
- ADM
- AMYRIS
- BASF
- BP PLC
- CHEVRON CORP.
- HONEYWELL INTERNATIONAL INC.
- NESTE
- PETROBRAS
- VALERO
- Chapter 17 Appendix: Other Biorefinery Companies and Acronyms
- 17.1 Biorefineries
- 17.1.1 Integrated Biorefinery
- 17.1.2 Biodiesel
- 17.1.3 Cellulosic Biorefineries
- 17.2 Biofuels
- 17.2.1 Genetic Engineering
- 17.2.2 Renewable Biodiesel
- 17.2.3 Cellulosic Gasoline and Diesel
- 17.2.4 Cyanobacteria
- 17.2.5 Industrial Enzymes
- 17.2.6 Biofuel Enzymes
- 17.2.7 Genome Engineering
- 17.2.8 Engineered Enzymes
- 17.2.9 Enzymatic Hydrolysis and Pyrolysis/Gasification
- 17.2.10 Renewable Oil and Bioproducts
- 17.2.11 Grain Ethanol
- 17.3 Chemicals
- 17.3.1 Bio-based Propylene Glycol
- 17.3.2 Ethylene Glycol (EG)
- 17.3.3 D(-) Lactic Acid

- 17.3.4 Glucaric Acid
- 17.3.5 C4-C6 Chemicals
- 17.3.6 Bio-based Nylon
- 17.3.7 Fatty Acids
- 17.3.8 Isobutanol
- 17.3.9 Squalane
- 17.3.10 Succinic Acid
- 17.3.11 Bio-based Gamma-Butyrolactone (GBL)/1,4-Butanediol (BDO) and Bio-based Acrylic Acid
- 17.3.12 1,4-Butanediol
- 17.3.13 Pellets/Chips/Logs
- 17.4 Biogas
- 17.5 Materials
 - 17.5.1 Pet Bottle Containing Bioplastics
 - 17.5.2 Benzene, Toluene and Xylene (BTX)
 - 17.5.3 Furan Dicarboxylic Acid (FDCA)
 - 17.5.4 Bioacrylic
- 17.6 Biopolymers
- 17.7 Biocomposites
- 17.8 Biopower
 - 17.8.1 Electricity
 - 17.8.2 Sale of Excess Biomass Power
 - 17.8.3 Biomass Waste Utilization
 - 17.8.4 Wood Pellets
- 17.9 Seeds
 - 17.9.1 Amylase Corn
- 17.10 BioDrugs and Herbals/Botanicals
 - 17.10.1 Biopharming
 - 17.10.2 Natural Skincare Products
 - 17.10.3 Vanillin
 - 17.10.4 Genetically Modified Yeast
 - 17.10.5 Valencene (Citrus Flavoring)
- 17.11 Medicine and Healthcare
 - 17.11.1 Engineered Insect Strains
 - 17.11.2 Attenuated Virus Cultures
 - 17.11.3 Cephalexin
 - 17.11.4 Palifosfamide
 - 17.11.5 Genetically Engineered Plant Cells
 - 17.11.6 Botanical Preparation
- 17.12 Acronyms

Biorefinery Products: Global Markets

Market Research Report | 2022-10-20 | 440 pages | BCC Research

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|---------------------|-----------|
| | Single User License | \$5500.00 |
| | 2-5 Users License | \$6600.00 |
| | Site License | \$7920.00 |
| | Enterprise License | \$9504.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

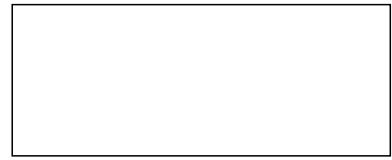
| | | | |
|---------------|----------------------|-------------------------------|---|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |
| | | Date | <input type="text" value="2026-02-18"/> |

Signature

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com