China Bio-acetic Acid Market Assessment, By Source [Biomass, Cornstarch, Others], By Application [Vinyl Acetate Monomer, Acetate Esters, Purified Terephthalic Acid, Acetic Anhydride, Others], By End-user Industry [Food and Beverages, Chemicals, Pharmaceutical, Textile, Cosmetics, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-04-22 | 122 pages | Market Xcel - Markets and Data

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Report description:

China bio-acetic acid market is projected to witness a CAGR of 6.96% during the forecast period 2025-2032, growing from USD 25.24 million in 2024 to USD 44.10 million in 2032F. The bio-acetic market in China is witnessing exponential growth, driven by the country's strong industrial base, rising demand across sectors like food and beverages, chemicals, and textiles, as well as government policies for promoting bio-based chemicals. In addition, environmental regulations and investments in biotechnology are further fostering innovation and sustainability within industry. Bio-acetic acid, which is produced through grain, sugar, and wood cellulose fermentation processes, is widely used in food applications due to its high purity and suitability for humans. Furthermore, the country's emphasis on bio-based and eco-friendly industries to reduce the carbon footprints, coupled with the advancements in production technologies, are fueling the market for sustained growth, supported by rising adoption of eco-friendly alternatives.

China is prioritizing bioeconomy in its Five-Year Plan, with the Chinese Academy of Agricultural Sciences (CAAS) partnering with Beijing Shoulang Biotechnology Co., Ltd. CAAS' breakthrough comes as part of China's drive to move away from petrochemical dependence. In 2021, China concretised its green commitments by announcing its first ever five-year plan to focus on the bioeconomy, committing USD 3.28 trillion to bio-agriculture, biotechnology, biofuels, bio-information and other sectors. The National Development and Reform Commission aims to valorize waste by-products, reduce virgin resource consumption, and replace fossil fuel chemicals with renewable alternatives by 2025. China's sustainability initiatives will influence efforts to decarbonize elsewhere, as over 90% of its emissions come from materials and production.

Technological Advancements in Fermentation and Biomass Conversion

Technological advancements in fermentation processes are revolutionizing the production of bio-acetic acid in China, particularly through the fermentation of kitchen waste. Technology involves use of high-activity dry yeast and acetic acid bacteria to ferment food waste into acetic acid with high efficiency. Anaerobic fermentation is initiated at controlled temperature, followed by addition of calcium carbonate for best pH, followed by aerobic fermentation, after which solid-liquid separation yields a fermentation liquid containing high concentration of acetic acid that accounts for 84-93% of the organic acids formed. Besides improved yield of acetic acid that can produce up to 28 grams per liter of fermentation liquid, the technology also helps in addressing green issues through recycling of food waste that otherwise leads to land filling. Through transformation of kitchen waste into valuable chemicals, the technology achieves China's sustainability targets and mitigates dependency on conventional fossil fuel-based processes, hence transforming the country into a leader in production of bio-based chemicals.

Hebei Yigao Biofuel company successfully operated their 240,000 tons per year biomass comprehensive use project in late 2021, producing qualified ethanol after enzyme decomposition and fermentation. The project aims to produce 25,000 tons of biofuel and 27,000 tons of by-products. Hebei currently operates one 58 ML/yr fuel ethanol facility, while Ningxia Shougang Lanza Jiyuan started production in May 2021. The first syngas-based fuel ethanol plant in Guizhou will produce 76 ML per year.

Strong Government Policies Promoting Bio-Based Chemicals

The government policies aimed strategically to encourage sustainability, and the development of bio-based chemicals for making China an ecofriendly industrial base, are driving the bio-acetic acid market in China. The government of China has been actively developing the bioeconomy through such strategic plans as the 14th Five-Year Plan for Bioeconomy Development, which emphasizes innovation, industrialization, and policy support for bio-production. All this emphasis on bio-products is in accordance with China's general environmental objectives, such as diminishing dependence on fossil fuels and increasing sustainability. China's environmental policy also encourages a cleaner production process to the chemical industry, which is in the interest of bio-acetic acid as a cleaner production process in comparison to conventional acetic acid. The policies not only encourage domestic production but also encourage foreign investment in bio-based companies, further driving the bio-acetic acid industry and its downstream products such as vinyl acetate monomer (VAM).

In March 2021, the People's Republic of China (PRC) approved the 14th Five-Year Plan (2021-2025) for National Economic and Social Development, also known as the Plan. The plan emphasizes superior, environmentally friendly development and seeks to lower the carbon footprint while building on the accomplishments of the 13th Plan, economic intensity and to achieve a peak in carbon dioxide emissions prior to 2030. Using the dual circulation method as the growth paradigm in conjunction with changes to raise living conditions, the plan places a strong emphasis on innovation as the cornerstone of contemporary development.

Rising Standards and Regulations for Healthier and Safer Ingredients in Cosmetics

Increased standards and regulations on safe and traceable ingredients that are human-safe for consumption are strongly driving China's bio-acetic acid market. Bio-acetic acid presents an eco-friendly alternative to petroleum-based products, which industries are shunning because of environmental concerns. The bio-acetic acid produced from renewable resources such as corn, maize, and sugar, is increasingly driving the demand for green products. The industries such as, food, drug, and chemical are widely employing bio-acetic acid to preserve food, such as antiseptics, and for chemical synthesis. Furthermore, strict government regulation of the health hazards that arise from using conventional acetic acid has driven the need to shift to bio-based products. Conventional acetic acid is hazardous because it burns skin and is toxic when inhaled or ingested, while bio-acetic acid is safer. Such trends, coupled with China's focus on sustainability and health-focused manufacturing processes, are fueling bio-acetic acid's widespread use in China's industries.

In July 2022, China's first clean beauty standard was released Cosmetics General Standards of Clean Beauty. It defines clean beauty products as cosmetics with transparent and traceable ingredients, safe for human health, environmentally and animal friendly, and socially responsible throughout their entire lifecycle.

Vinyl Acetate Monomer (VAM) Witnessing Significant Growth

Downstream application of bio-acetic acid, Vinyl Acetate Monomer (VAM) is witnessing steady growth with its extensive applications in various industries. VAM is a valuable raw material for the manufacture of polymers and copolymers, e.g., poly vinyl acetate in adhesives, coatings, and sealants; ethylene-vinyl acetate for hot-melt adhesives and film; and ethylene-vinyl alcohol for food packaging and pharmaceuticals. Its production primarily results in acetoxylation of ethylene by acetic acid and oxygen on

palladium-based catalysts in a vapor-phase process for efficiency and scalability. Application of bio-acetic acid as a renewable feedstock is also in harmony with increasing environmental consciousness, again favoring demand for VAM. Industries are increasingly employing bio-based VAM for its lower carbon footprint and adaptability to green processes of production. The trend is in line with the central role of VAM in driving innovation in the pharmaceutical, food and beverages industries as well as driving global sustainability initiatives.

Future Market Scenario (2025 - 2032F)

- China's stringent environmental policies and regulations will continue to drive the demand for bio-acetic acid as a sustainable alternative to traditional petrochemical-based acetic acid. These regulations aim to reduce carbon emissions and promote eco-friendly manufacturing practices, aligning with global sustainability goals.
- The vinyl acetate monomer segment is expected to remain a significant driver in the Chinese bio-acetic acid market. As industries such as construction and packaging continue to grow, the demand for VAM will increase, further boosting the bio-acetic acid market.
- Improvements in biorefinery technologies and production processes will enhance the efficiency and cost-effectiveness of bio-acetic acid production. This technological advancement will make bio-acetic acid more competitive with conventional acetic acid, driving market growth.
- The market is likely to benefit from strategic partnerships and investments aimed at expanding production capacities and improving supply chains. Such collaborations will help in scaling up bio-acetic acid production, meeting growing demand, and ensuring a stable supply of sustainable feedstocks.

Key Players Landscape and Outlook

The bio-acetic acid market in China is poised for high growth with increasing demand for high-purity and sustainable chemicals. Bio-acetic acid, produced through grain and sugar fermentation or wood cellulose fermentation, finds widespread use in the food sector, with nearly 90% of its applications. Its human consumption compatibility and eco-friendly production processes meet China's stringent environmental regulations and sustainability goals. Technological progress in biorefinery technologies is driving the market with increasing efficiency and purity of production, thereby making bio-acetic acid a viable alternative to petrochemical-based acetic acid. Additionally, China's focus on reducing carbon emissions and fossil fuel reliance also encourages the use of bio-based chemicals. Strategic partnerships and investments are assisting manufacturers in enhancing their capacities to meet growing domestic demand.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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