

Bio-plasticizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Bio-plasticizers Market size is estimated at 474.27 kilotons in 2025, and is expected to reach 642.81 kilotons by 2030, at a CAGR of 6.27% during the forecast period (2025-2030).

COVID-19 negatively impacted the market in 2020. During the pandemic, construction activities were temporarily halted due to the government-imposed lockdown. This led to a decrease in the consumption of bio-plasticizers based on flooring and wall coverings, wires, and cables, which, in turn, negatively impacted the demand for bio-plasticizers. However, the demand for packaging from the food and e-commerce segment significantly increased during this situation, which, in turn, stimulated the demand for packaging materials made up of bio-plasticizers, thus enhancing the market growth.

Key Highlights

- Over the short term, the augmenting demand for bio-plasticizers for flexible PVC and the prohibition on phthalate-based plasticizers are expected to drive the growth of the market.
- The high cost of bio-plasticizers, when compared with conventional plasticizers, is likely to hinder the growth of the market.
- Ongoing research on bio-based plasticizers is likely to create opportunities for the market during the forecast period.
- The Asia-Pacific region is expected to dominate the market. It is also likely to witness the highest CAGR during the forecast period.

Bio Plasticizers Market Trends

Increasing Demand from Flooring, Roofing and Wall Covering

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- Bio-plasticizers help reduce water requirements and make concrete strong and workable. These are generally organic substances or a combination of organic and inorganic substances that help reduce water content for workability.
- The quantity of plasticizers added is about 0.1%-0.4% by weight of cement. This amount reduces 5%-15% of the water requirement and also leads to an increase in workability from about a 3-8 cm slump. A plasticizer, in general, entrains less than 2% air.
- According to the National Bureau of Statistics of China, the output value of the construction works in the country accounted for CNY 25.92 trillion (USD 4.02 trillion) in 2021, compared to CNY 23.27 trillion (USD 3.37 trillion) in 2020. This led to an increase in the demand for flooring and wall covering, which, in turn, increased the demand for the bioplasticizers market.
- In India, the construction sector is an important pillar for the growth of the economy. The government is taking a number of steps to make sure that the country has good infrastructure by a certain date. The Indian government has been actively boosting housing construction as it aims to provide houses to about 1.3 billion people.
- Furthermore, according to the US Census Bureau, the annual value of new construction put in place in the United States accounted for USD 1,792 billion in 2022, compared to USD 1,626 billion in 2021. Moreover, the annual value of residential construction put in place in the United States was valued at USD 908 billion in 2022, an increase of 13% compared to USD 803 billion in 2021.
- Thus, with the growing demand for the conservation of water resources, the use of plasticizers is rapidly increasing in flooring and wall coverings.
- Owing to all these factors, the demand for bio-plasticizers is likely to grow across the world during the forecast period.

The Asia-Pacific Region to Dominate the Market Growth

- The Asia-Pacific construction industry is the largest in the world. It is growing at a healthy rate because the middle class is getting richer and more people are moving to cities.
- The expansion of the industry has also benefited from the addition of infrastructure and the entry of significant players from the European Union into China's lucrative market.
- China's construction industry has developed rapidly in the past few years, due to the central government's push for infrastructure investment as a means to sustain economic growth. China was leading in the construction industry, with an added value of USD 1.29 trillion in 2022.
- Also, the total floor space of new homes built in Japan in 2022 was about 69 million square meters, which was less than the 70 million square meters built in 2021. Additionally, in 2022, approximately 859,500 housing starts were initiated in Japan. This led to an increase in the consumption of bio-plasticizers for applications like wire, cables, flooring, and wall coverings.
- Foreign investment restrictions have also been lifted for land development, high-end hotels, office buildings, international exhibition centers, and building and running big theme parks. Over the next few years, the bioplasticizers market in the region is likely to grow due to growth in the infrastructure and transportation sectors.
- The Packaging Industry Association of India (PIAI) also says that India is becoming a place where the plastic packaging industry likes to be. The packaging industry is the fifth-largest sector in the Indian economy.
- The healthcare industry is growing steadily, with spending on healthcare and the number of medical facilities in the country going up every year. Indian government policies that have been made more open have also made it possible for 100% foreign direct investment in the medical devices market.
- In India, the government introduced the world's largest government-funded healthcare program, the NHP Scheme. In the Economic Survey of 2022, India's public expenditure on healthcare stood at 2.1% of GDP in 2021-22, compared with 1.8% in 2020-21. Additionally, the Indian government is planning to introduce a credit incentive program worth INR 500 billion (USD 6.8 billion) to boost the country's healthcare infrastructure.

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- Therefore, the abovementioned factors are expected to have a significant impact on the market during the forecast period.

Bio Plasticizers Industry Overview

The bio-plasticizers market is partially consolidated in nature. Some major players in the market (not in any particular order) include Dow, Evonik Industries AG, Cargill, Inc., BASF SE, and Jungbunzlauer Suisse AG, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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