

Polybutylene Adipate Terephthalate Market by Grade, Application (Films, Sheets & Bin Liners, Coatings & Adhesives, Molded Products, Fibers), End-use Industry (Packaging, Consumer Goods, Agriculture, Bio-medical), and Region - Global Forecast to 2030

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Report description:

The global PBAT market is expected to reach USD 2.76 billion by 2030 from USD 1.51 billion in 2025, at a CAGR of 12.8% from 2025 to 2030. Because of its increasing use in rigid and semi-rigid packaging applications, the thermoforming grade is projected to hold the second-largest share of the PBAT market. Because of its special blend of flexibility, heat resistance, and biodegradability, PBAT can be used in thermoforming processes, which are frequently used to create products like disposable cutlery, clamshell containers, compostable food trays, and lids.

<https://www.marketsandmarkets.com/Images/polybutylene-adipate-terephthalate-market-Overview.webp>

Biodegradable thermoformed products are becoming increasingly popular as food service providers, particularly in North America and Europe, move toward sustainable alternatives in response to legal requirements such as the EU Single-use Plastics Directive and several state bans in the US. In industries where performance and compostability are crucial, such as institutional catering, takeout services, and ready-to-eat food packaging, thermoformed PBAT products are also being utilized more.

The increasing availability of PBAT blends with PLA or starch, which improve rigidity and moldability-two essentials for successful thermoforming-benefits the market. Second, only to the leading films & sheets segment in terms of volume and revenue, the thermoforming-grade PBAT market is expected to grow strongly and sustainably due to growing industrial composting capabilities and consumer preference for eco-friendly packaging formats.

"In terms of value, the molded plastic products application is expected to account for the second-largest share of the overall

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market during the forecast period"

The increasing demand for biodegradable alternatives to injection-molded single-use products is expected to drive significant growth in the molded plastic products segment. Because of its versatility, biodegradability, and compatibility with injection molding, PBAT is an ideal material for producing a wide range of molded goods, including food containers, packaging components, disposable cutlery, and agricultural tools. Additionally, the rise of international regulations on non-compostable single-use plastics, especially in the food service, hospitality, and healthcare sectors, is further supporting this growth. Manufacturers are being encouraged to shift toward bio-based molded products due to strict regulations implemented by countries in Europe, North America, and the Asia Pacific, such as the EU Single-use Plastics Directive and various state-level bans in the US.

Additionally, molded PBAT products are becoming more popular in institutional and takeout packaging, where lightweight, compostable alternatives that satisfy ASTM D6400 and EN 13432 standards are replacing conventional rigid plastic components. The molded plastic products segment is expected to maintain its position as the second-largest contributor to the PBAT market, as composting infrastructure advances and consumer demand for environmentally friendly packaging rises.

"Consumer goods end-use industry to account for the second-largest market share during the forecast period"

The increasing demand for eco-friendly and biodegradable alternatives in everyday products is anticipated to drive the growth of consumer goods. With excellent mechanical properties, compostability, and compatibility with various blends, PBAT is ideal for a wide range of consumer goods, including shopping bags, household packaging, pet waste bags, disposable cutlery, and hygiene products. Brands across various industries are incorporating PBAT-based materials in response to rising consumer preferences for sustainable lifestyles and heightened environmental awareness. The expansion of compostable household and personal care products through retail and e-commerce is also contributing to the segment's growth. Additionally, the use of PBAT in private-label products by major supermarket chains in North America and Europe is significantly increasing market penetration. Governments are encouraging manufacturers to replace traditional plastics in consumer applications through initiatives promoting sustainable product design and the implementation of green procurement policies. The consumer goods sector is well-positioned to remain a major driver of PBAT demand, reinforcing its status as the second-largest application segment after packaging, especially as industrial composting infrastructure expands and global regulatory pressure on single-use plastics grows.

"Europe to account for the second-largest share of the PBAT during the forecast period"

Due to robust regulatory frameworks, developed recycling and composting infrastructure, and rising consumer demand for environmentally friendly packaging, Europe is anticipated to hold the second-largest share of the global PBAT market. With stringent laws like the EU Single-use Plastics Directive, the Green Deal, and the Circular Economy Action Plan that encourage the use of biodegradable and compostable substitutes like PBAT, the European Union has been leading the global effort to reduce plastic pollution. Key markets in the region include Germany, Italy, France, and Spain, all of which actively enforce laws prohibiting traditional plastic bags and promote certified compostable packaging for use in waste management, food service, and retail settings. For European manufacturers looking to meet compostability standards like EN 13432, PBAT is a preferred material due to its compatibility with PLA and starch blends and suitability for rigid and flexible packaging, agricultural films, and consumer goods. Europe continues to play a significant role in the global PBAT market, ranking second only to the Asia Pacific in terms of market share and influence, due to sustained innovation, public support for sustainable materials, and a strong emphasis on reducing plastic waste through legislative action.

This study has been validated through primary interviews with industry experts globally. These primary sources have been divided into the following three categories:

-[]By Company Type: Tier 1 - 60%, Tier 2 - 20%, and Tier 3 - 20%

-[]By Designation: C Level - 33%, Director Level - 33%, and Managers - 34%

-[]By Region: North America - 20%, Europe - 25%, Asia Pacific - 25%, the Middle East & Africa - 15%, and Latin America - 15%

The report provides a comprehensive analysis of company profiles of prominent companies such as BASF SE (Germany), Chang Chun Group (China), Kingfa Sci. & Tech. Co., Ltd. (China), Novamont S.p.A. (Italy), GO YEN CHEMICAL INDUSTRIAL CO LTD (Taiwan), Anhui Jumei Biological Technology Co., Ltd. (China), Hangzhou Peijin Chemical Co., Ltd. (China), Jin Hui Zhao Long High Tech Co., Ltd. (China), T.EN Zimmer GmbH (Germany), Mitsui Plastics, Inc. (US), Zhejiang Baidigorei Biomaterials Co., Ltd. (China),

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Hengli Group Co., Ltd. (China), Junyuan Petroleum Group (China), Qingdao Zhoushi Plastic Packaging Co., Ltd. (China), Red Avenue New Materials Group Co., Ltd. (China), SGA POLYCHEM PVT LTD (India), Xinjiang Blue Ridge Tunhe Sci. & Tech. Co., Ltd. (China), Taprath Elastomers LLP (India), Easy Flux (India), Entec Polymers (US), Indocal (India), Yuvika Green Earth Solutions (India), Ningbo Changhong Polymer Scientific and Technical Inc. (China), Polyrocks Chemical Co., Ltd. (China), and Shandong Dawn Polymer Co., Ltd. (Dawn Group) (China).

Research Coverage

This research report categorizes the PBAT market by grade (extrusion and thermoforming), application (films, sheets & bin liners, coatings & adhesives, molded products, and fibers), end-use industry (packaging, consumer goods, agriculture, and bio-medical), and region (North America, Europe, Asia Pacific, the Middle East & Africa, and South America). The scope of the report includes detailed information about the major factors influencing the growth of the PBAT market, such as drivers, restraints, challenges, and opportunities. A thorough examination of the key industry players has been conducted to provide insights into their business overview, solutions & services, key strategies, contracts, partnerships, and agreements. Product launches, mergers and acquisitions, and recent developments in the PBAT market are all covered. This report includes a competitive analysis of upcoming startups in the PBAT market ecosystem.

Reasons to Buy this Report

The report will provide market leaders and new entrants with information on the closest approximations of the revenue numbers for the PBAT market and its subsegments. It will also help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report will also help stakeholders understand the market pulse and provide information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following points:

- Analysis of key drivers (shift in consumer preference toward bio-based plastics, increasing use of packaging and compostable applications, technological advancements in biodegradable plastics, and government focus on green procurement policies and regulations), restraints (technical characteristics and performance issues of PBAT, high production cost of PBAT, and lack of adequate composting infrastructure), opportunities (development of new applications, high potential of PBAT in emerging economies, and building a strong green branding strategy), and challenges (competition from alternative bioplastics and consumer misunderstanding regarding biodegradability) influencing the growth of the PBAT market.

- Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities, and service launches in the PBAT market.

- Market Development: Comprehensive information about lucrative markets ? the report analyses the PBAT market across varied regions.

- Market Diversification: Exhaustive information about services, untapped geographies, recent developments, and investments in the PBAT market.

- Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players such as BASF SE (Germany), Chang Chun Group (China), Kingfa Sci. & Tech. Co., Ltd. (China), Novamont S.p.A. (Italy), GO YEN CHEMICAL INDUSTRIAL CO LTD (Taiwan), Anhui Jumei Biological Technology Co., Ltd. (China), Hangzhou Peijin Chemical Co., Ltd. (China), Jin Hui Zhao Long High Tech Co., Ltd. (China), T.EN Zimmer GmbH (Germany), Mitsui Plastics, Inc. (US), Zhejiang Baidigorei Biomaterials Co., Ltd. (China), Hengli Group Co., Ltd. (China), Junyuan Petroleum Group (China), Qingdao Zhoushi Plastic Packaging Co., Ltd. (China), Red Avenue New Materials Group Co., Ltd. (China), SGA POLYCHEM PVT LTD (India), Xinjiang Blue Ridge Tunhe Sci. & Tech. Co., Ltd. (China), Taprath Elastomers LLP (India), Easy Flux (India), Entec Polymers (US), Indocal

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(India), Yuvika Green Earth Solutions (India), Ningbo Changhong Polymer Scientific and Technical Inc. (China), Polyrocks Chemical Co., Ltd. (China), and Shandong Dawn Polymer Co., Ltd. (Dawn Group) (China).

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