

Europe Bioplastics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Europe Bioplastics Market Analysis

The European bioplastics market is currently 0.67 million tons in 2025 and is on track to reach 1.54 million tons by 2030, supported by a forecast compound annual growth rate (CAGR) of 17.96% between 2025 and 2030. Policymakers across the EU are tightening rules on fossil-based polymers, so manufacturers are treating bio-based alternatives as an essential rather than optional upgrade, a shift that is filtering through procurement departments in food, retail, automotive, and consumer-goods value chains.

Europe Bioplastics Market Trends and Insights

EU Single-Use Plastics Directive Triggering Mandatory Compostable Solutions by 2030

The Directive's phased bans and recycled-content quotas are creating structural pull for compostable biopolymers in items such as coffee caps, produce bags, and quick-service trays. Since the law uses material performance criteria rather than brand names, producers can position PLA, PHA, or starch blends as compliant pathways that also score carbon-intensity gains. Member-state timelines differ, so companies with modular production recipes are capturing early share in markets that front-load enforcement. An immediate observation is that differing fee structures, especially in Poland and Ireland, encourage local sourcing of renewable feedstocks to cut transport footprints, subtly tilting supply chains toward regionalised hubs.

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Growing Demand for Bioplastics in Packaging

Flexible packaging already holds 43% European bioplastics market share and is growing at nearly 23% CAGR, because film and pouch makers can often substitute a single layer without overhauling entire filling lines. Brand owners report that switching from fossil PE to bio-PE or to a compostable laminate yields marketing benefits that offset modest price premiums, so sales teams pitch these materials as revenue protectors rather than pure cost items. Innovation hubs such as Mondi's FlexStudios demonstrate how co-development with customers cuts lead times and unlocks line-speed parity with incumbent resins. The implicit takeaway is that converters who master both extrusion and barrier-coating know-how gain bargaining power in negotiations with multinational food companies.

Limited Industrial-Composting Capacity Outside Benelux, Italy, and France

Only a fraction of EU regions operate certified industrial composting sites, so compostable packaging sometimes ends up in landfills or contaminates mechanical recycling streams. Producers respond by launching dual-certified grades that are both recyclable and industrially compostable, spreading risk across disposal pathways. Investors studying waste-management maps notice that capacity gaps overlap with high tourism regions in Southern Europe, suggesting that new composting plants could tap steady seasonal feedstock from hospitality waste. The inference here is that infrastructure bottlenecks will influence not just polymer selection but also plant-location decisions for new bioplastics facilities.

Other drivers and restraints analyzed in the detailed report include:

Government Procurement Policies Favoring Bio-content in Public-Sector Packaging / Ban on Fossil-Based Plastics in Specific Applications / Inconsistent End-of-Life Labelling Rules Across EU-27 Complicate Brand Adoption /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Bio-based biodegradables command 49% Europe Bioplastics market share in 2024 and are forecast to post a 22.56% CAGR through 2030, reinforcing their leadership position. High throughput lines producing PLA and emerging PHA grades use advantaged feedstock sourcing and license plate technologies that compress production costs as volumes ramp. Early-stage evidence from fast-food chains adopting compostable cutlery shows that product-quality perception improves when functionality matches petro-based equivalents, leading to repeat orders and predictable scale-up. A telling inference is that cost-parity looks achievable earlier than once feared because rising fossil feedstock prices narrow the gap faster than forecast.

Bio-based non-biodegradables, while representing a smaller slice of Europe's Bioplastics market size, provide drop-in compatibility with existing PET and PE recycling streams, which appeals to beverage brands reluctant to alter reverse-logistics systems. Announced investments in plant-based PET confirm that supply constraints, rather than demand hesitation, remain the growth limiter.

Sugarcane accounts for roughly 44% Europe Bioplastics market share by feedstock in 2024 because industrial fermenters in Brazil and Thailand run at world-scale and supply Europe via integrated logistics. Stable sucrose yields and established certification schemes keep procurement risks low, so buyers lock multi-year contracts. Cellulosic residues from forestry and straw hold a smaller base today but expand at a rapid 22.3% CAGR as projects such as DEEP PURPLE demonstrate the feasibility of turning municipal wastewater sludge into PHA intermediates. A current market inference is that cellulosic routes will diversify geopolitical supply, dampening price volatility linked to sugar cycles.

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The Europe Bioplastics Market Report Segments the Industry by Type (Bio-Based Biodegradables, Bio-Based Non-Biodegradables), Feedstock (Sugarcane/Sugar Beet, Corn, and More), Processing Technology (Extrusion, Injection Molding, Blow Molding, and More), Application (Flexible Packaging, Rigid Packaging, Automotive and Assembly Operations, and More), and Country (Germany, United Kingdom, Italy, France, Netherlands, and More).

List of Companies Covered in this Report:

Arkema / BASF / BIO ON SpA / Biome Bioplastics / BIOTEC Biologische Naturverpackungen GmbH & Co. KG. / Eni S.p.A. (Novamont) / Evonik Industries AG / FKUR / FUTERRO / Green Dot Bioplastics Inc / Innovia Films / Lactips / Minima / Mitsubishi Chemical Group Corporation / NatureWorks LLC / Plantic / Rodenburg Biopolymers / Sulapac Oy / TORAY INDUSTRIES, INC. / TotalEnergies (Total Corbion) /

Additional Benefits:

The market estimate (ME) sheet in Excel format /

3 months of analyst support /

Table of Contents:

1 Introduction

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 EU Single-Use Plastics Directive Triggering Mandatory Compostable Solutions by 2030

4.2.2 Growing Demand for Bioplastics in Packaging

4.2.3 Environmental Factors Encouraging a Paradigm Shift

4.2.4 Government Procurement Policies Favoring Bio-Content in Public-Sector Packaging

4.2.5 Ban On Fossil-Based Plastics in Specific Applications

4.3 Market Restraints

4.3.1 Limited Industrial-Composting Capacity Outside Benelux, Italy, And France

4.3.2 Inconsistent End-Of-Life Labelling Rules Across the EU-27 Complicating Brand Adoption

4.3.3 High Energy Prices in Europe Inflating Resin Extrusion Costs

4.3.4 Slow REACH Certification Pathways for Novel Bio-Monomers

4.4 Value Chain Analysis

4.5 Patent Analysis

4.6 Porter's Five Forces

4.6.1 Bargaining Power of Suppliers

4.6.2 Bargaining Power of Buyers

4.6.3 Threat of New Entrants

4.6.4 Threat of Substitutes

4.6.5 Degree of Competition

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5 Market Size and Growth Forecasts (Volume)

5.1 By Type

5.1.1 Bio-based Biodegradables

5.1.1.1 Starch-based

5.1.1.2 Polylactic Acid (PLA)

5.1.1.3 Polyhydroxyalkanoates (PHA)

5.1.1.4 Polyesters (PBS, PBAT, PCL)

5.1.1.5 Other Bio-based Biodegradables

5.1.2 Bio-based Non-biodegradables

5.1.2.1 Bio Polyethylene Terephthalate (PET)

5.1.2.2 Bio Polyethylene

5.1.2.3 Bio Polyamides

5.1.2.4 Bio Polytrimethylene Terephthalate

5.1.2.5 Other Bio-based Non-biodegradables

5.2 By Feedstock

5.2.1 Sugarcane / Sugar Beet

5.2.2 Corn

5.2.3 Cassava and Potato

5.2.4 Cellulosic and Wood Waste

5.2.5 Others (Algae and Microbial Oil)

5.3 By Processing Technology

5.3.1 Extrusion

5.3.2 Injection Molding

5.3.3 Blow Molding

5.3.4 3D Printing

5.3.5 Others (Thermoforming, etc.)

5.4 By Application

5.4.1 Flexible Packaging

5.4.2 Rigid Packaging

5.4.3 Automotive and Assembly Operations

5.4.4 Agriculture and Horticulture

5.4.5 Construction

5.4.6 Textiles

5.4.7 Electrical and Electronics

5.4.8 Other Applications

5.5 By Country

5.5.1 Germany

5.5.2 United Kingdom

5.5.3 Italy

5.5.4 France

5.5.5 Netherlands

5.5.6 Spain

5.5.7 Nordic

5.5.8 Rest of Europe

6 Competitive Landscape

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6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles {(includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, Recent Developments)}

6.4.1 Arkema

6.4.2 BASF

6.4.3 BIO ON SpA

6.4.4 Biome Bioplastics

6.4.5 BIOTEC Biologische Naturverpackungen GmbH & Co. KG.

6.4.6 Eni S.p.A. (Novamont)

6.4.7 Evonik Industries AG

6.4.8 FKuR

6.4.9 FUTERRO

6.4.10 Green Dot Bioplastics Inc

6.4.11 Innovia Films

6.4.12 Lactips

6.4.13 Minima

6.4.14 Mitsubishi Chemical Group Corporation

6.4.15 NatureWorks LLC

6.4.16 Plantic

6.4.17 Rodenburg Biopolymers

6.4.18 Sulapac Oy

6.4.19 TORAY INDUSTRIES, INC.

6.4.20 TotalEnergies (Total Corbion)

7 Market Opportunities and Future Outlook

7.1 EU Circular Economy and Green Deal Strategies

7.2 White-space and Unmet-need Assessment

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