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Future of BioPlastics 2026

Turning innovation into market opportunity

A market intelligence perspective by Ceresana

For companies, start-ups, investors, universities, research institutions, institutions and consortia

Opening keynote | Oliver Kutsch, CEO

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Bioplastics are entering a more disciplined market phase

Growth remains attractive — but application fit, economics and credible end-of-life concepts decide success

1 Growth is real, but selective

Not every material, region or application will scale at the same pace.

2 Applications decide success

Performance, cost, certification and customer pull matter more than generic “bio” labels.

3 Market intelligence reduces risk

Structured data separates market signals from noise before investment, launch or partnering.

Executive implication

The bioplastics discussion is moving from “Can it be made?” to “Where does it create measurable value?”

For companies and project partners, this means that product strategy, market entry, scale-up and communication need a stronger evidence base than isolated innovation claims.

Ceresana market data shows a biodegradable-led 2024 bioplastics market

Ceresana market shares provide a demand-oriented view beyond external capacity figures

Market structure by degradability

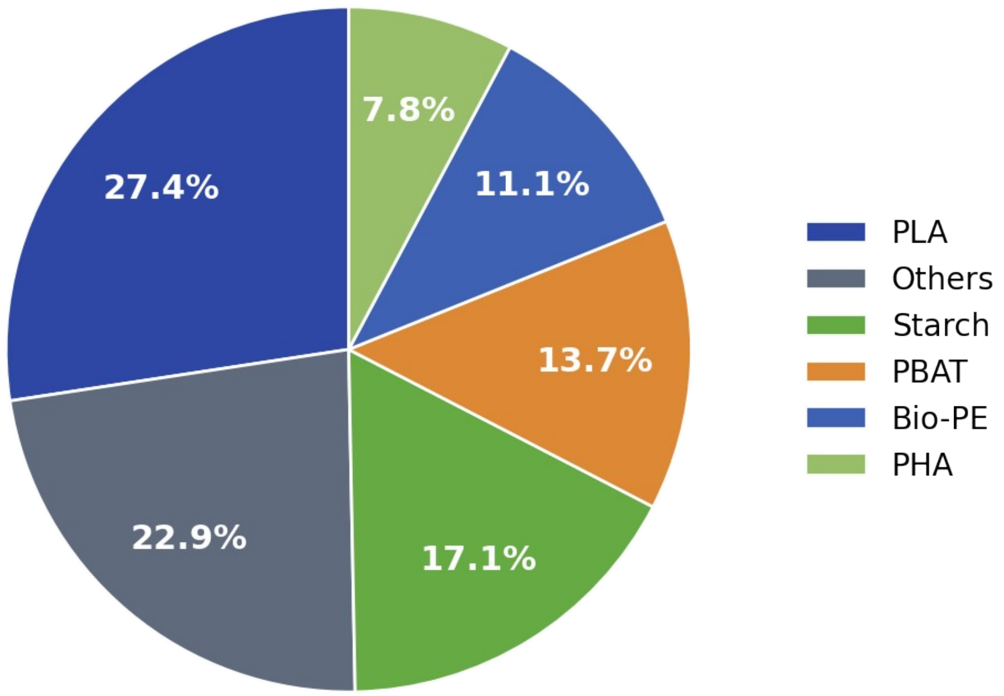
70.1%
Biodegradable

29.9%
Non-biodegradable

Market reading

Biodegradable solutions dominate the quantified 2024 market, while PLA and starch remain the most important product anchors.

Product shares — global market, 2024

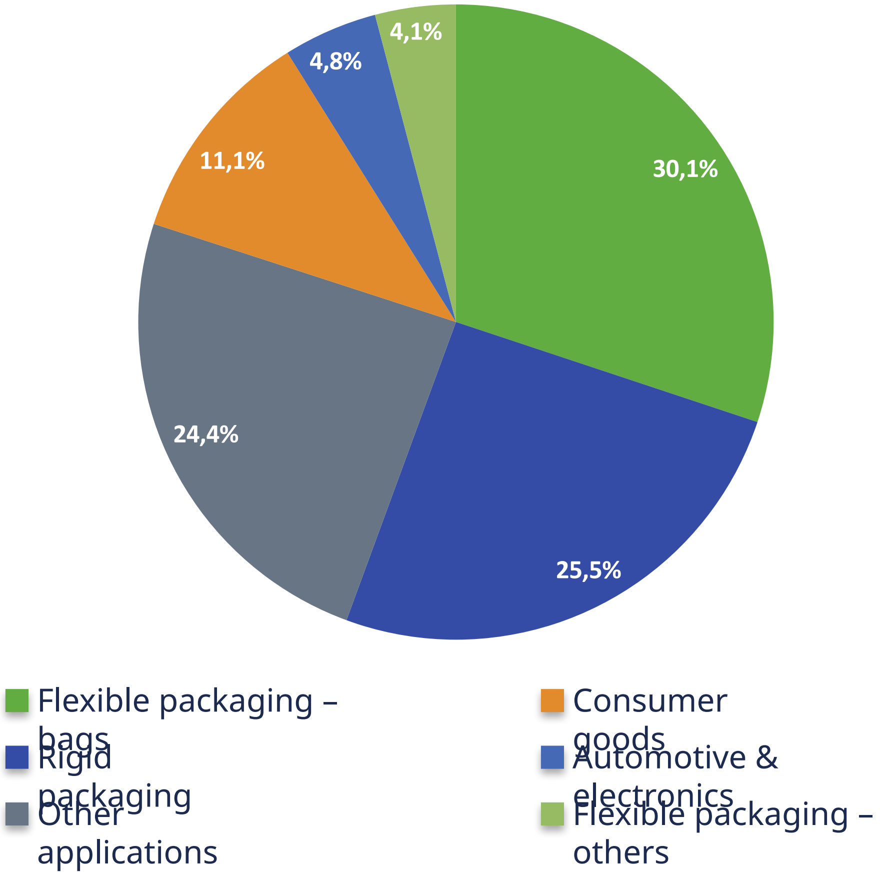


Data basis: Ceresana Market Report Bioplastics (9th Ed.), global market data 2024

Packaging is the core demand arena, but not the only application field

Demand is concentrated where visibility, regulation and customer awareness create clear market pull

Application shares — global market, 2024



Why packaging leads

High visibility, regulatory momentum, moderate technical requirements and consumer awareness support demand.

Where technical uses matter

Automotive, electronics and durable goods can become attractive where bio-based content supports Scope 3 and fossil-substitution targets.

Commercial implication

Application-level market intelligence is essential: the same polymer can face very different demand logic by end-use.

Data basis: Ceresana Market Report Bioplastics (9th Ed.), global market data 2024

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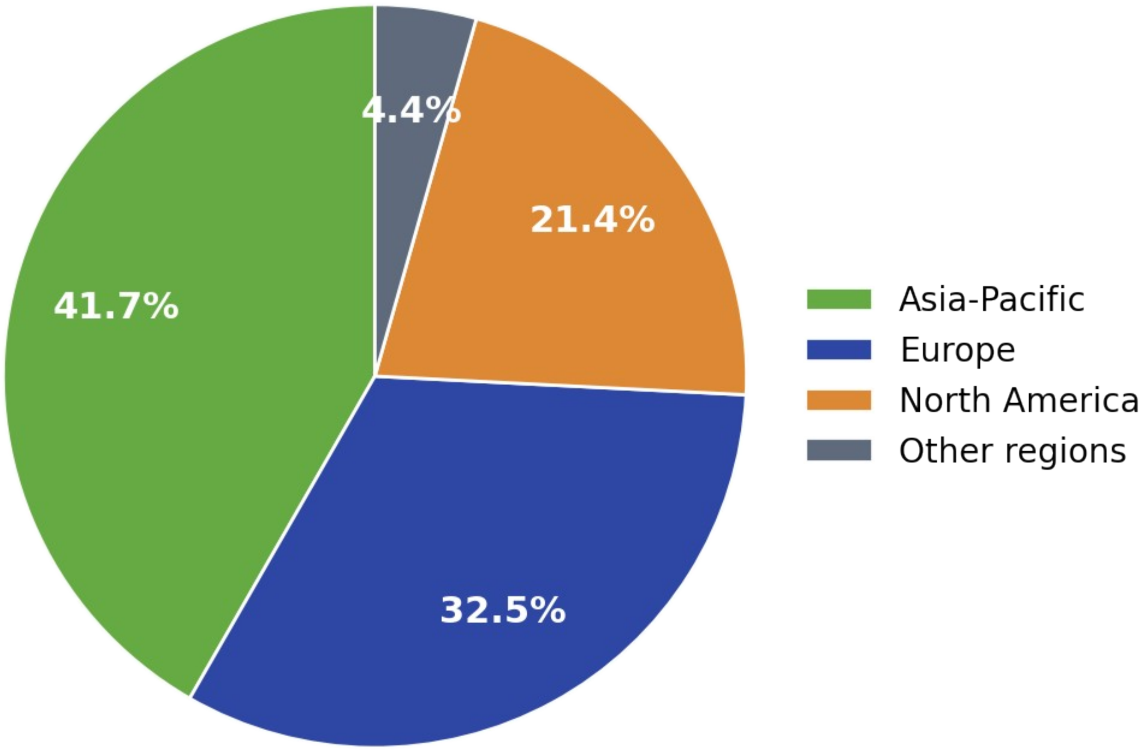
Regional demand and growth hotspots are uneven across the market

Ceresana data highlights Asia-Pacific as a major demand base and growth hotspot

Regional demand shares — global market, 2024



Highest CAGR segments, 2024–2034

10.3% PLA

8.4% Automotive & electronics

7.2% Flex. packaging

7.1% PHA

8.6% Asia-Pacific

Market reading

Growth is not uniform: product, industry and regional prioritization must be linked in one market model.

Data basis: Ceresana Market Report Bioplastics (9th Ed.); CAGR 2024–2034

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Bioplastics are not one market — terminology matters for strategy

Feedstock origin, biodegradability and end-of-life logic create different business cases

	Biodegradable	Non-biodegradable
Bio-based	**Bio-based & biodegradable** PLA • PHA • TPS Often linked to compostability or biodegradation claims.	**Bio-based & durable** Bio-PE • Bio-PET • Bio-PA Drop-in logic; end-of-life usually follows conventional routes.
Fossil-based	**Fossil-based & biodegradable** PBAT • PCL End-of-life claims possible, but not fossil-free.	**Conventional plastics** Other fossil plastics Benchmark for cost, processing, scale and infrastructure.

Strategic implication

Sustainability does not come from a label alone. Market success depends on application, value proposition, infrastructure and credible claims.

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Four forces are turning bioplastics into a strategic market question

The topic is shifting from technical possibility to market and investment relevance

Regulation

PPWR, carbon targets, green claims and end-of-life requirements change market rules.

Brand pressure

Customers and retailers require credible sustainability and transparent material choices.

Innovation

PLA, PHA/PHB, bio-PA, additives, compounds and processing solutions expand options.

Supply strategy

Lower fossil dependency, regional resilience and diversified feedstocks.

These forces create opportunity — but they also increase the need for structured market transparency.

Ceresana lens

Translate sustainability and policy signals into market scenarios and application forecasts.

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Commercial value is created where sustainability, performance and economics meet

Successful bioplastics applications need more than a positive environmental story

Market-fit scorecard

Packaging and food service

High visibility, regulatory pressure and clear brand-owner interest.

Technical and durable uses

Bio-based content can support Scope 3 and fossil-substitution strategies.

Organic-waste-linked uses

Compostability can create value where infrastructure and behavior align.

Ceresana lens: identify where these value drivers translate into measurable demand.

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Market transparency is needed across the full bioplastics value chain

Strategic decisions depend on more than polymer-level data

Feedstock
sugar, starch, residues

→

Polymer
PLA, PHA, bio-PE

→

Compound
additives, fillers

→

Converter
film, injection, foam

→

Brand owner
packaging, consumer, B2B

→

End-of-life
reuse, recycling, composting

Typical market questions

Demand
Where is real market pull emerging?

Customers
Which segments and buyers should be prioritized?

Competition
Who is active along the chain?

Regulation
Which rules accelerate or limit demand?

Ceresana provides data across markets, applications, countries and value-chain positions.

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The biggest risk is backing the wrong application, country or partner

The market is attractive, but uneven — disciplined prioritization matters

Overestimated demand

Immature applications can look attractive before customers commit.

Price sensitivity

Premiums are tolerated only where value is clear.

Regulatory misread

Rules on claims, compostability and packaging can change the business case.

Weak partner choice

Scale-up requires the right suppliers, converters and brand owners.

Ceresana role

Independent market studies and tailored research help reduce these risks before companies invest, launch, sell or partner.

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Use market studies for orientation — and custom research for decisions

Both formats reduce uncertainty at different decision depths

Market studies

- Fast access to structured market data
- Countries, applications, product types and forecasts
- Competitive landscape and company profiles
- Ideal for strategic orientation and internal alignment

Custom studies

- Confidential research for specific decisions
- Market entry, product launch, pricing and partner search
- Customer groups, competitors, regulation and scenarios
- Ideal before investment, sales campaigns or partnerships

Key message: choose the research format according to decision depth, confidentiality and timing.

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Ceresana custom studies translate strategic questions into targeted evidence

Modules reflect service areas from market analysis to partner and value-chain screening

Market analysis & forecasts
Market size • demand • scenarios

Customer & segment analysis
Target groups • requirements • sales potential

Competitor mapping
Competitors • positioning • company profiles

Value chain analysis
Suppliers • converters • brand owners • substitutes

Pricing & substitution
Price levels • substitution risks • cost pressure

Partner screening
Potential customers • partners • consortium contacts

Decision focus
Especially relevant before market entry, product launch, pricing decisions, sales activation, investments or strategic partnerships.

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Ceresana supports the full bioeconomy decision ecosystem

Different stakeholders need different types of market transparency

Companies

Product strategy • sales planning • procurement • sustainability positioning

Start-ups

Market proof • partner search • first customers • go-to-market priorities

Investors

Market sizing • scenarios • risk assessment • due-diligence support

Universities / RTOs

Exploitation pathways • business models • industry relevance

Institutions / associations

Independent data • policy context • market transparency

Consortia

Value-chain evidence • stakeholder mapping • competitor analysis

FoB:Plast creates a shared platform for market evidence, innovation practice and partnership building.

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Consortium projects need market logic in addition to technical expertise

Business model, market intelligence, competitor mapping and value-chain analysis support exploitation and impact

Business model

Revenue logic • value proposition • commercialization route

Market intelligence

Demand drivers • applications • forecasts • customer needs

Competitor mapping

Comparable solutions • incumbents • start-ups • substitutes

Value chain analysis

Feedstock • production • conversion • brand owners • end-of-life

Exploitation strategy

Use cases • routes to market • industry uptake

Stakeholder mapping

Partners • customers • associations • policy actors

Ceresana contribution

We complement technical development with market evidence, commercial logic and transparency along the value chain.

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Ceresana’s bioeconomy coverage spans materials, chemicals and applications

Ready-to-use market studies plus confidential custom research for adjacent questions

Bioplastics & polymers

- Bioplastics
- Polylactic Acid (PLA)
- Bioplastic Films
- Biobased Packaging

Bio-based chemicals

- Biobased Solvents – Europe
- Biobased Solvents – World
- Biobased Surfactants
- Biobased Adhesives
- Biobased Intermediates

Applications & demand markets

- Biobased Adhesives – Europe
- Biobased Paints & Coatings
- Biobased Insulation Materials
- Adjacent plastics and packaging markets

Strategic value

This breadth matters because bioeconomy decisions involve substitution, competing materials, customer industries and adjacent value-chain dynamics.

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Is your next bioplastics decision evidence-based?

Move from market complexity to commercially credible next steps

Market Reality

Bioplastics growth is attractive — but products, regions, applications and claims develop unevenly.

Market Intelligence

Ceresana links demand data, forecasts, competitors, customers and value-chain intelligence.

Strategic Confidence

Make market entry, launch, sales, investment and consortium decisions with a stronger evidence base.

Next Step

Talk to Ceresana about market studies, custom research or partner and value-chain screening.

Decision message

A strong market case connects product, application, region, customer pull, regulation and value-chain readiness — before major resources are committed.

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Before you invest, launch or partner — validate the market

Ceresana supports market studies, custom research and partner/value-chain screening

What we can clarify

Market size & growth
Quantify demand, revenues, forecasts & hot spots

Applications & customers
Identify where market pull is strongest

Competition & value chain
Map competitors, suppliers, converters and partners

Regulation & substitution
Assess policy impact, claims and substitution risks

Scenarios & strategy
Translate uncertainty into decision options

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Talk to Ceresana for market intelligence, strategic insights, and custom research — and turn ideas into market-ready decisions.