



the  
**BIGGER**  
picture  
*of biopolymers*





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Sustainable Solution Provider

- 35+ years in Europe’s polymer value chain
- Broad portfolio: fossil, bio-based, and recycled polymers
- Technical expertise & market insights



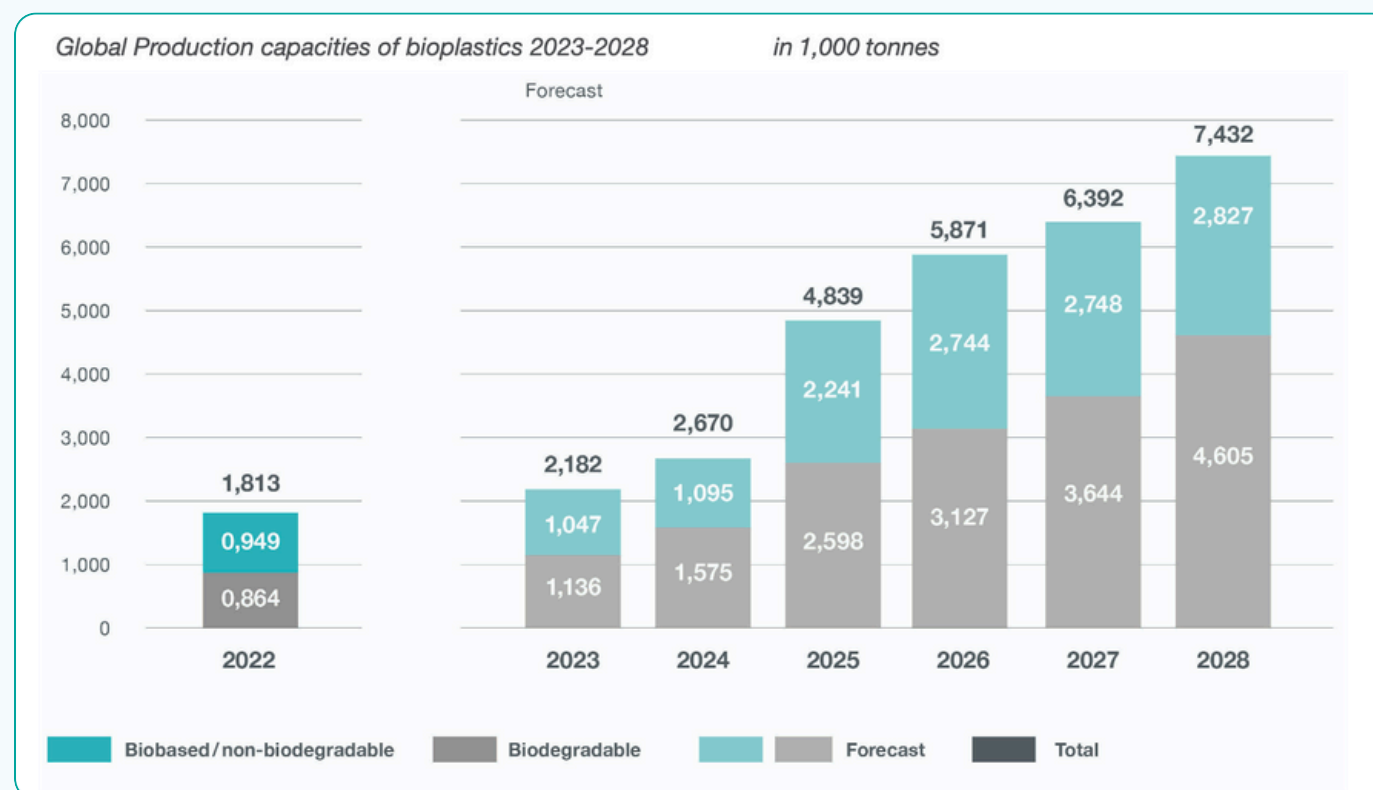
**VISION:** Be the leading provider of bio-based polymers

**Mission:** Cater holistic solutions to the plastics converting industry

## The Bigger Picture – Beyond Production Capacity

**+100%**  
from 2025

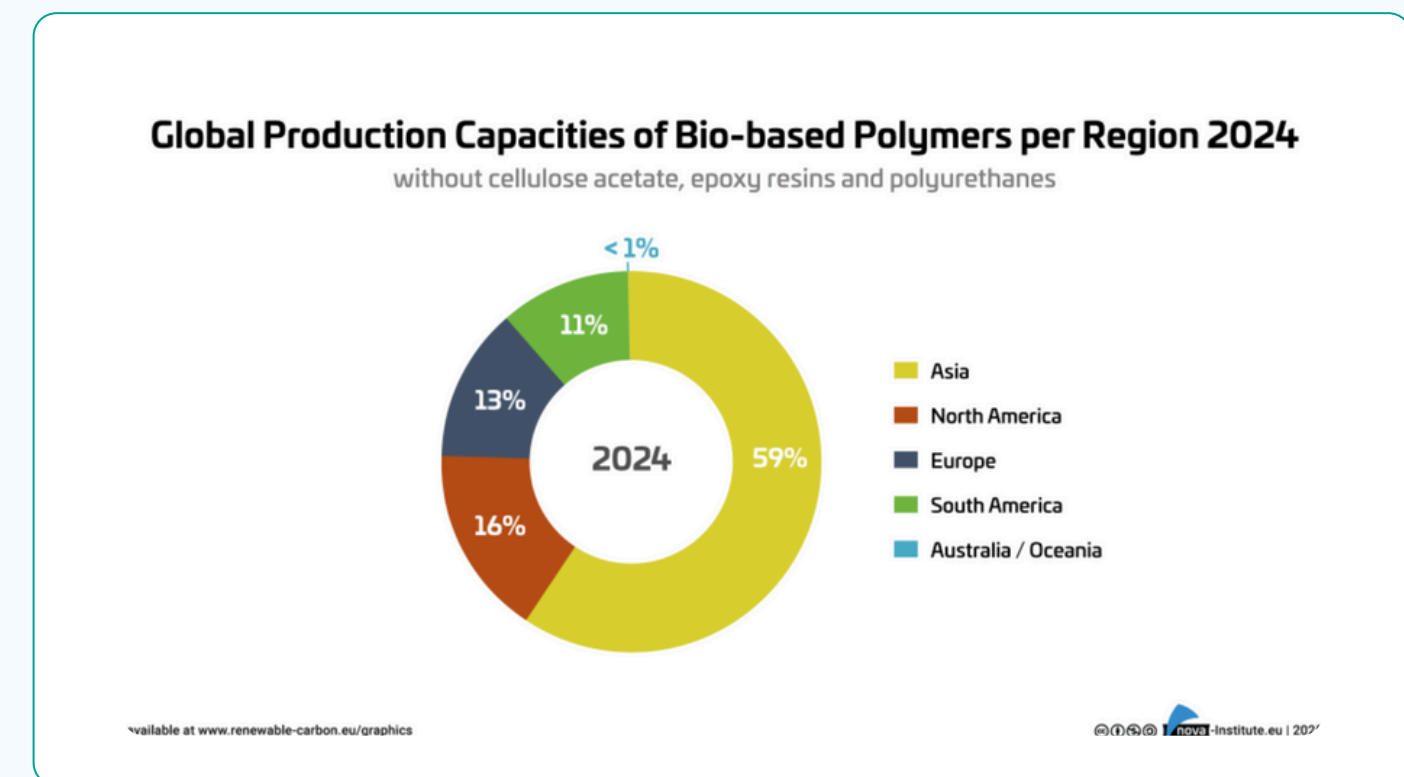
Global production capacity will nearly double to 7.4 million tonnes by 2028.



Source: *European Bioplastics, Market Data 2023*

**13%**

Europe represents about 13%, led by PLA, starch blends, Bio-PE, and Bio-PP.

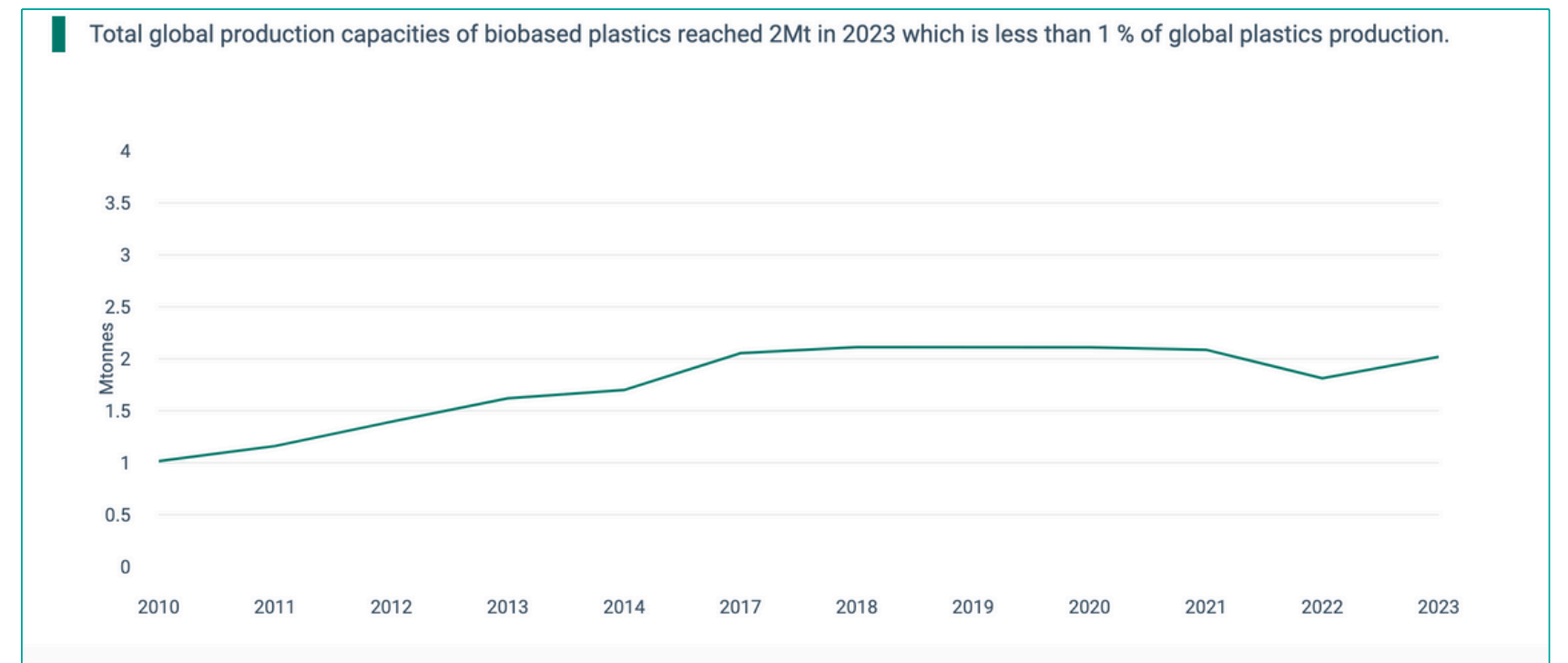
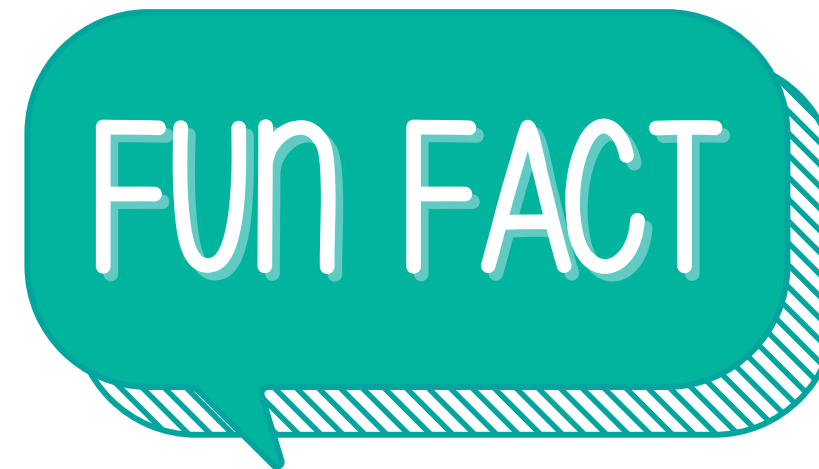


Source: *Renewable Carbon*- Mar. 2025

capacity  $\neq$  impact.

# less than 1%

Bioplastics remain <1% of global plastics production.



Source: European Environment Agency, Market Data 2023

The Bigger Picture of Biopolymers- The Path forward

and more

9%

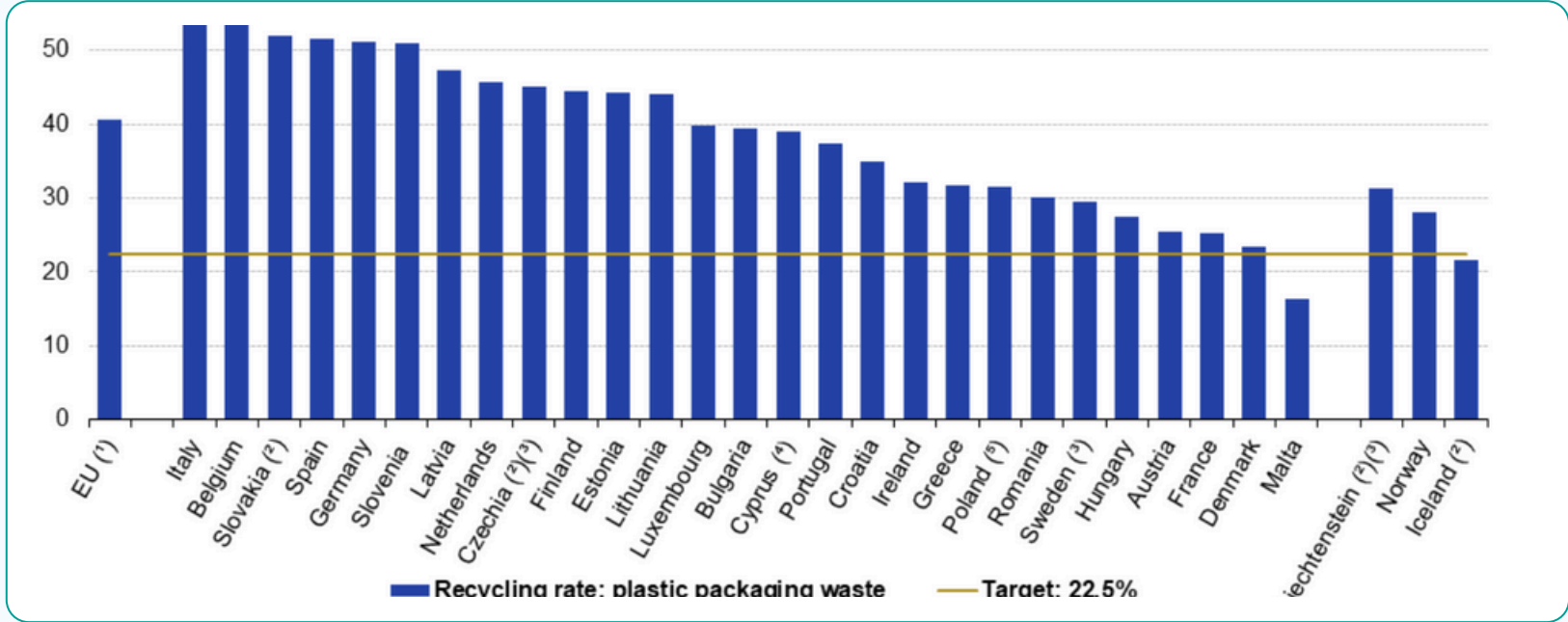
Bioplastics remain <1% of global plastics production.



Source: OECD

40%

In Europe, about 40% of collected plastic packaging is officially recycled.



Source: Eurostat

# Compliance:

## PPWR (Feb 2025) :

- All packaging recyclable by 2030
- Binding reuse quotas
- Mandatory recycled content levels

## France and Italy;;

- France and Italy push even further with national compostable rules, adding development possibilities

# Reality:

**Access to collection:** < 25 % of EU households can put compostables in organic bins. Verified by EU Commission reports.

**Sorting bottleneck:** Even where collected, compostables often get diverted → incineration. Infrastructure lags.

**Result:** A compostable product can be legally compliant yet practically incinerated.

# BIOPOLYMERS:

Creating Value Today

## Cost efficiency in niches

Horticulture films: lower disposal costs → direct savings for farmers and growers

## Infrastructure preparation

Early adoption supports municipalities in testing and scaling biowaste systems



## Brand credibility

Retailers in France & Italy use certified compostable bags and packaging

Certification schemes strengthen customer trust beyond “bio” claims

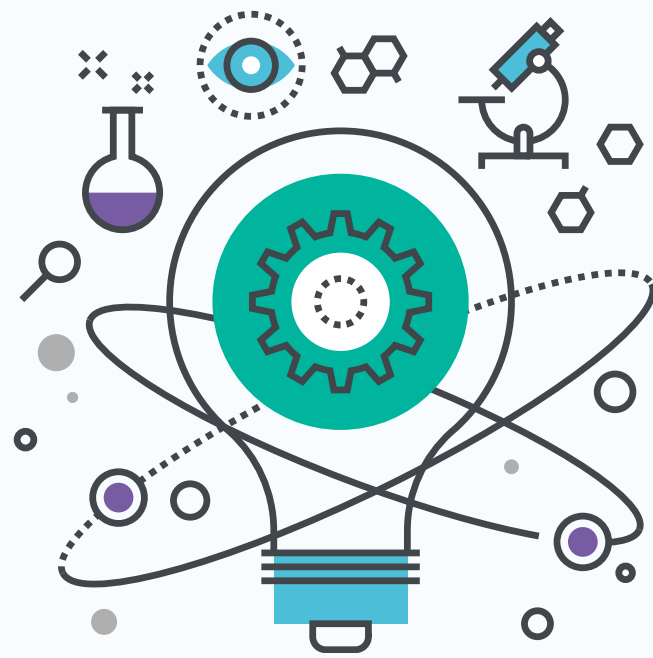
## Innovation leadership

Pilots today secure early-mover advantage before regulatory tightening



# BIOPOLYMERS:

Innovation Meets Collaboration



## Innovation in biopolymers:

- enzymatic recycling pilots in Germany and France,
- new PLA-PBAT blends with better heat resistance,
- bio-based nylons in automotive.



## Customers demand:

- Stable supply,
- Compatibility with existing equipment,
- Clear certification,
- And real end-of-life options.



# Bio-Net – Compostable Netting Solutions

By Mesh Pack GmbH (Germany), BiologiQ Inc. (USA) & Plastrans Technologies GmbH (Austria)



## SDG 12

### 100 % compostable\*

Compostable with food waste

## SDG 13

### Reduced CO<sub>2</sub> footprint

Replaces fossil PP/PE nets with compostable alternatives.

## SDG 14,15

### Eliminates microplastic leakage

**Microplastics solution:** Eliminates fragment pollution from net cutting and disposal

## SDG 17

### international partnership

This project shows how innovation + collaboration = real adoption.



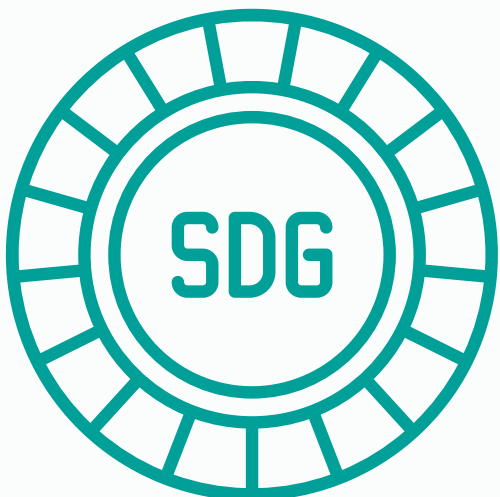


Sustainable Solution Provider

ISO 9001

ISO 14001

ISCC PLUS



- **Curating materials:** PLA and other compostable polyesters, Bio (attributed)-PE, Bio (attributed)-PP, Thermoplastic Starch Nuplastiq.
- **Supporting adoption:** technical trials, compliance advice, and financial models.
- **COMMUNICATING RESPONSIBLY:** HELPING CUSTOMERS AVOID GREENWASHING.

- **Bridging East & West:** making sustainable polymers accessible in CEE markets.
- **Building networks and value chains.**
- **Embedding SDGs:** using them as a framework to guide our portfolio, projects, and partnerships.



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