

PRESS RELEASE

NEW MARKET DATA 2019: BIOPLASTICS INDUSTRY SHOWS DYNAMIC GROWTH

Berlin, 4 December 2019 – The results of the European Bioplastics’ annual market data update, presented today at the 14th European Bioplastics Conference in Berlin, confirm a dynamic growth of the global bioplastics industry. “In an increasingly environmentally conscious context, the global market for bioplastics is predicted to grow by more than 15 percent over the next five years“, says Hasso von Pogrell, Managing Director of European Bioplastics. “This trend is possible thanks to the steadily increasing demand for sustainable products by both consumers and brands alike and the continuous efforts of the bioplastics industry to develop innovative materials with improved properties and new functionalities.”

The global bioplastics production capacity is set to increase from around 2.1 million tonnes in 2019 to 2.4 million tonnes in 2024. Innovative biopolymers such as PP (polypropylene) and PHAs (polyhydroxyalkanoates) are driving this growth. PHAs are an important polymer family that entered the market at a larger commercial scale, which continues to increase. Production capacities are set to more than triple in the next five years. These polyesters are bio-based, biodegradable, and feature a wide array of physical and mechanical properties. Production capacities of PP are set to almost sextuple by 2024. This is due to the widespread application of PP in a wide range of sectors. PP is a very versatile material that features excellent barrier properties. High-performance PP grades are an ideal replacement for several conventional fossil-based plastics, especially PE. The European Commission (EC) is working actively on clarifying criteria and applications for plastic products where the use of compostable plastics represents an advantage. The initiative of the EC will ultimately help stakeholders along the plastics and bio-waste value chains to grasp the benefits of compostable plastics in a circular economy context.

Bio-based, non-biodegradable plastics, including the drop-in solutions bio-based PE (polyethylene) and bio-based PET (polyethylene terephthalate), as well as bio-based PA (polyamides), currently make up for around 44 percent (almost 1 million tonnes) of the global bioplastics production capacities. The production of bio-based PE is predicted to continue to grow as new capacities are planned to come on line in Europe in the coming years. Intentions to increase production capacities for bio-based PET, however, have not been realised nearly at the rate predicted in previous years, but actually declined over the years. Instead, the focus has shifted to the development of PEF (polyethylene furanoate), a new polymer that is expected to enter the market in 2023. PEF is comparable to PET, but is fully bio-based and furthermore features superior barrier and thermal properties, making it an ideal material for beverage bottles.

Packaging remains the largest field of application for bioplastics with almost 53 percent (1.14 million tonnes) of the total bioplastics market in 2019. The data also confirms that bioplastics materials are already being used in many other sectors, and the portfolio of application continues to diversify. Segments, such as automotive & transport or building & construction, significantly increased their relative share.

With a view to regional capacity development, Asia remains a major production hub with over 45 percent of bioplastics currently being produced there. Presently, one fourth of the production capacity is located in Europe. This share is predicted to grow to up to 30 percent by 2024.

Press contact:

*Oliver Buchholz, Communications Manager, European Bioplastics, Marienstr. 19/20, 10117 Berlin,
Tel: +49 (0) 30 28482 350, Fax: +49 (0)30 284 82 359, E-Mail: press@european-bioplastics.org*

The land used to grow the renewable feedstock for the production of bioplastics is estimated to be 0.7 million hectares in 2019, and continues to account for only around 0.02 percent of the global agricultural area of 4.8 billion hectares. Despite the market growth predicted in the next five years, the land use share for bioplastics will remain at only around 0.02 percent. „The data shows once more that there is no competition between renewable feedstock for food and feed, and the use for bioplastics” says Francois de Bie, Chairman of European Bioplastics, “94 percent of all arable land is used for pasture, feed and food.”

The market data update 2019 has been compiled in cooperation with the research institute nova-Institute (Hürth, Germany). The data for the global production capacities of bioplastics is based on the market study “Bio-based Building Blocks and Polymers” by nova-Institute (2020). For more information on the study and full market data report, please go to www.bio-based.eu/markets

Summary market data 2019 is available for download on the EUBP website: https://www.european-bioplastics.org/wp-content/uploads/2019/11/Report_Bioplastics-Market-Data_2019_short_version.pdf

Market data graphics are available here: <https://www.european-bioplastics.org/news/multimedia-pictures-videos/>

European Bioplastics:

European Bioplastics (EUBP) is the European association representing the interests of the bioplastics industry along the entire value chain. Its members produce, refine and distribute bioplastics i.e. plastics that are bio-based, biodegradable, or both. More information is available at www.european-bioplastics.org.

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