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Title: Renewable Chemicals Market Update: Geopolitics, Protectionism, and Supply-Chain Realignment

Abstract:

This presentation examines how geopolitics is reshaping the operating reality for renewable chemicals through protectionism, tariffs, trade disruptions, and war conflict, while capital remains tight and end-markets continue to recalibrate. It frames the renewable chemicals industry as operating in a more fragmented global system, where policy divergence including delayed or streamlined sustainability regulations in Europe and shifting climate-policy priorities elsewhere is changing the near-term risk profile for projects and value chains.

These macro forces translate into concrete market implications such as supply chain realignment and manufacturing self-sufficiency strategies, regional production shifts – including China's continued capacity build-out, Europe's petrochemical shutdowns, and rising manufacturing edge in parts of South/Southeast Asia and the Middle East. It also captures evolving feedstock economics for both renewable and fossil-based raw materials. This presentation will provide brief updates on several bio-based intermediates and polymers development and commercialization highlighting where scaling is accelerating versus where projects are stalling in the valley of death.