



Bio-based and CO₂-based polymers Markets, frameworks, hurdles and opportunities

Green Chemistry - White Biotechnology Cherleroi, 08 May 2019

Achim Raschka (Head of Markets & Technology) nova-Institut GmbH, Hürth (Cologne), Germany





Bio-based & CO₂-based Economy



Applied research for your needs



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private and independent research institute interdisciplinary, international team

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• Turnover 3.0 mln € / year

Dissemination &

Marketing Support

Communication &

Networking

Events

EU Project Dissemination

Sustainability

Life Cycle Assessment

Assessments

Environmental footprint

Socio-economic Impacts

• 30 employees

Political Framework & Strategy

System Analysis Strategic Consulting Circular Economy

Bio- and CO₂-based Economy

Chemicals & Materials Biorefineries • Industrial Biotechnology Carbon Capture & Utilisation

Market Research

Trends & Competition Analysis Feasibility & Potential Studies Innovation Scouting Raw Material Supply Availability Price development Sustainability

Techno-Economic Evaluation (TEE)

Process Economics Target Costing Analysis Life Cycle Costing



Selected customers from industry, associations and public as well as political institutions



Associations/Clusters/NGOs

AVK (DE), APAG (EU), BIC (EU), BioEconomy Cluster (DE), Birdlife (EU), CEFIC (EU), CLIB2021 (DE), CO₂ Value Europe (EU), EIHA (EU), EPF (EU), European Bioplastics (EU), IAR (FR), IBB (DE), VHI (DE), WWF (US/DE)

Automotive Industry

Brose (DE), BMW (DE), Mercedes/Daimler (DE), Dräxlmaier (DE), Faurecia (DE), Ford (DE), Johnson Controls (DE), Porsche (DE), Quadrant (DE), VW (DE)

Chemistry, Plastics & Other Materials

Anellotech (US), BASF (DE/CA), Borregaard (NO), BRAIN (DE), Corbion (NL), Covestro (DE), CropEnergies (DE), DuPont (US/DE), Elastopoli (FI), EnobraQ (FR), Eridania Sadam (IT), Evonik (DE), ExxonMobil Chemical (BE/US), FKuR (DE), Gidetec (FI), Global Green Chemicals (THA), Golden Compound (DE), Honeywell (US), Hyne Timber (AU), InfraServ (DE), Kraton (US), Mondi (AT), Neste (FI), PCC SE (DE), Peter Greven (DE), SABIC (NL/SA), Stora Enso (SE), Südzucker (DE), Suiker Unie (NL), Synvina (NL), Teijin (JP), Total (FR), UPM (FI)

End Applications

Colruyt (BE), ESE Expert (DE), geobra Brandstätter Stiftung/PLAYMOBIL® (DE), IKEA (SE), Kosche (DE), Lego (DK), Leifheit (DE), Logocos (DE), Nestlé (CH), Neudorff (DE), REWE (DE), Velux (DK), WhiffAway (UK)

Consulting & Financing

AFC Consulting (DE), Blezat Consulting (FR), Boston Consulting Group (DE), Clever Consult (BE), ClouPartners (DE), Deloitte (NL), E4Tech (UK), Ecorys (FR), Ernst & Young (FR/DE), Inter-American Development Bank (US), KPMG (MY), meó Consulting (DE)

Engineering

Coperion (DE), Ferrostaal (DE), Reifenhäuser (DE), Uhde-Inventa Fischer (DE)

Ministries & Institutions

BBI (EU), BBI-JU (EU), BfN (DE), BMBF (DE), BMELV (DE), DBU (DE), DECC (UK), DEFRA (UK), European Commission (EU), FAO (IT), FNR (DE), GIZ (DE), KfW (DE), Ministry of Economic Affairs (NL), Netherlands Enterprise Agency (NL), NIA (TH), UBA (DE)

Research Institutes

Fraunhofer UMSICHT (DE), HS Bremen (DE), IFEU (DE), INNVENTIA (SE), INRA (FR), Joint Research Centre (EU/SP), London Imperial College (UK), Öko-Institut (DE), RAPRA (UK), VTT (FI), Wageningen UR (NL), Wuppertal Institut (DE)



Current Projects



European research projects

AFTERLIFE – Advanced Filtration Technologies for the Recovery and Later conversion of relevant Fractions from wastewater. (09/2017 – 08/2021)

BioForever – BIO-based products from FORestry via Economically Viable European Routes. (09/2016 – 08/2019)

BioMonitor – Towards a method for the collection of statistical data on bio-based industries and bio-based products. (06/2018-05/2022)

 $BioRECO_2VER$ – Microbial platforms for CO_2 reuse processes in the low-carbon economy. (01/2018 - 12/2021)

CHASSY – Model-Based Construction and Optimisation of Versatile Chassis Yeast Strains For Production Of Valuable Lipid and Aromatic Compounds. (12/2016 – 12/2020)

COSMOS – Camelina & crambe Oil crops as Sources for Medium-chain Oils for Specialty oleochemicals. (03/2015 – 08/2019) **MAGIC** – Marginal lands for Growing Industrial Crops: Turining a burden into an opportunity. (06/2017 – 05/2021)

MARISURF – Novel marine derived biomolecules and industrial biomaterials. (09/2015 – 08/2020)

PEFerence – From bio-based feedstocks via di-acids to multiple advanced bio-based material with a preference for polythylene furanoate. (09/2017 – 04/2022)

PULP2VALUE – Processing Underutilised Low value sugarbeet Pulp into VALUE added products. (07/2015 – 06/2019)

ReSolve – REnewable SOLVEnts with high performance in application and improved toxicity profile. (06/2017 – 05/2020)

STAR4BBI – Standards and Regulations for the Bio-based Industry. (09/2016 – 08/2019)

WoodCircus – Underpinning the vital role of the forest-based sector in the Circular Bio-Economy. (11/2018-10/2021)

Zelcor – Zero Waste Ligno-Cellulosic Biorefineries by Integrated Lignin Valorisation. (09/2016 – 08/2020)

National projects

BEPASO – Bioökonomie 2050: Potentiale, Zielkonflikte, Lösungsstrategien. (12/2016 – 01/2020)

BioCONversion – Bioconversion of CO/syngas into a plastic precursor. (04/2018– 04/2021)

WeRümA – Werkstoffentwicklung auf Basis von Rübenschnitzeln für marktrelevante Anwendungen. (01/2017 – 12/2020)

ZeroCarb FP II – Nachhaltigkeitsanalysen für die Teilprogramme Bioplastics, 2Acid+, Green Mining and Additives 1. (02/2017 – 09/2019)

Bio-based Polymers & Building Blocks – the best market reports available





www.bio-based.eu/reports









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www.bio-based-conference.com

15 – 16 May 2019 Maternushaus | Cologne | Germany

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About 200 participants already registered



www.bio-based.eu

Save the Date: nova-Sessions in 2019



Bio-based Building Blocks and Polymers – Markets, Trends and Innovations

30 April 2019, 10:00 - 16:30 h Terminal 1, Airport Cologne/Bonn, Germany

nova Session on Technology of the Future: Carbon Capture and Utilization (CCU)

24 September 2019, 10:00 - 16:30 h Airport Cologne/Bonn, Germany

EU Circular Economy and Plastic Policy

21 May 2019 Wölhaff Conference Center, Terminal 1, Airport Cologne/Bonn, Germany



Contact: Mr. Dominik Vogt, +49 (0) 2233 48 14 49, Dominik.vogt@nova-institut.de All conferences at www.bio-based.eu

Bio- and CO₂-based Economy: feedstocks, processes and products







Renewable Carbon Strategy





Plastics production from 1950 to 2017



Includes thermoplastics, polyurethanes, thermosets, elastomers, adhesives, coatings and sealants and PP-fibres. Not included PET-, PA-, and polyacryl-fibres.

Data source: PlasticsEurope, Consultic and nova-Institute







Strong recycling efforts could keep the steadily growing demand for new plastics between 400 and 500 million tonnes by 2050. This demand could then be met, for example, by 30 percent biomass and 70 percent direct CO2 use. The biomass required for this would amount to around 1% of the biomass currently used worldwide in all areas of application (13 - 14 billion tonnes, 60 percent of which is feed for the production of milk and meat alone).

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The majority of global plastics waste currently goes to landfill & incineration





Policy decisions needed to bring to reality the switch of the plastic-waste flow from landfill and incineration to recycling.

Developed economies face high costs due to small scale and lack of efficient collection and sorting processes with so far limited application of automation. ¹ Durable applications with an average lifetime >1 year will end up as waste only in later years; non-durable applications go straight to waste

² 150 million metric tons of mixed plastic waste from nondurable applications that end-up as waste in same year, plus 110 million metric tons of mixed plastic waste from production in previous years



Plastic Waste





Source: The Japan Times





Recycling



Currently politicians mainly count on recycling schemes to preserve fossil resources. In a circular economy the recycling of existing plastic materials and other organic chemistry products is, without any doubt, an important source for renewable carbon which could and should be exploited more comprehensively.

However, you should not succumb to the illusion that recycling will be able to provide the lion's share of renewable carbon in a sustainable manner. Recycling must not be turned into an incontrovertibly true principle that is applied without any sustainability assessments.

Chemical (and biochemical) recycling have to expanded in future – including the recycling of CO_2 and other C_1 -sources from offgases and wastes.





Latest Market Data on Bio-Based Polymers





What is new?





Bio-based Building Blocks and Polymers – Global Capacities, Production and Trends 2018–2023



Authors:

Raj Chinthapalli, Pia Skoczinski, Michael Carus, Wolfgang Baltus, Doris de Guzman, Harald Käb, Achim Raschka, Jan Ravenstijn February 2019

This and other reports on the bio- and CO_2 - based economy are available at www.bio-based.eu/reports

Short and full version available: www.bio-based.eu/reports

- Comprehensive information on capacity development from 2018 to 2023, per bio-based building block and polymer
- For the first time production data for the year 2018, per bio-based polymer
- Detailed functional and production-related information on a total of 17 bio-based building blocks and 16 polymers
- Analyses of market developments and producers per building block and polymer
- Detailed research, calculation and explanation of the market development of cellulose acetate (CA), bio-based epoxy resins and bio-based polyurethanes
- Comprehensively updated 171 detailed company profiles – from start-ups to multinational corporations







Schematic differentiation of pathways of drop-in, smart drop-in and dedicated bio-based chemicals







Bio-based polymers production capacities in 2018 and 2023











Global production capacities of bio-based polymers by region in 2018 and 2023

(excluding polyurethanes, epoxy resins and cellulose acetate)







Shares of the produced bio-based polymers in different market segments in 2018 and 2023



Consumer goods
Building and construction
Automotive and transports
Textiles (incl. woven, non-woven and fibres)
Packaging - rigid (incl. food serviceware)
Packaging - flexible
Electrics and electronics (incl. casing)
Agriculture and horticulture
Functional (adhesives, coatings, cosmetics etc.)
Others



All figures available at www.bio-based.eu/markets





Polymers based on CO₂ An overview on possible technologies





Carbon Dioxide Utilization in natural photosynthesis





Source: Wikipedia (Daniel Mayer, At09kg; CC-by-sa 3.0)

Carbon Dioxide Utilization and renewable energy







CCU Implementations



Nova started a list to get an overview on already existing CCU installations:

CO₂ capture

- Currently 28 projects / companies listed for CO₂ capture from various sources: ambient air, pre combustion, oxyfuel combustion and post combustion
- Ranging from pilot, demonstration, pre-commercial to commercial scale

CO₂ utilisation

- Currently 70 projects / companies listed using or planning to use CO₂ for the production of fuels, polymers, proteins, gases, concrete / cement and chemicals
- Ranging from lab, pilot, demonstration, pre-commercial to commercial scale

 $\rightarrow\,$ closer look on 13 companies with plants in demonstration and $\,$ commercial scale

Carbon utilisation

 Chemical recycling as a further approach of recycling not only CO₂ but carbon containing waste in general



CO₂ utilisation - fuels



company	headquarter	scale		produc	start date	endproduct				
			city	country	status	capacity		onaproduct		
Biotechnological CO ₂ conversion processes										
LanzaTech Inc.,	United States	commercial	Ghent	Belgium	construction	62,000 t/a	2019			
		commercial	Shougang	China	in operation	48,000 t/a	2018	ethanol and e.g. n-butanol and kerosene		
		commercial	Gurgaon	India	construction	34,000 t/a	2019			
		commercial	Nelspruit	South Africa	construction	52,000 t/a	2019			
		commercial	Modesto	United States	construction	35,000 t/a	2019			
Phytonix Corp.	United States	commercial		United States	planning	> 500 000 t/a	2019 / 2020	n-butanol		
		commercial		Europe	planning	> 300,000 t/a				
Chemical CO ₂ conversion processes										
Carbon Recycling International	Iceland	commercial	Grindavik	Iceland	in operation	4,000 t/a	2011	methanol		
Nordic Blue Crude AS	Norway	commercial	Herøya	Norway	construction	8,000 t/a	2020	diesel,		
Sunfire GmbH	Germany	demonstration	Dresden	Germany	in operation	> 3 t/a	2014	naphtha, wax		

CO₂ utilisation Gases, proteins, polyols and others



	headquarter	scale		produ						
company			city	country	status	capacity / output power	start date	endproduct		
Biotechnological CO ₂ conversion processes										
Algenol Biotech	United States	commercial	Fort Myers	United States	in operation		2014	spirulina, colorants, proteins		
Electrochaea GmbH	Germany	commercial (demonstration)	Avedøre	Denmark	in operation	50 Nm ³ /h / 0.5 MW	2016			
		commercial (demonstration)	Solothurn	Switzerland	in operation	35 Nm ³ /h / 0.35 MW	2018	methane		
		commercial (demonstration)		Hungary	planning	500 Nm ³ /h / 5 MW				
Photanol B.V.	Netherlands	demonstration	Delfzijl	The Netherlands	planning	20 t/a	2020	organic acids		
Chemical CO ₂ conversion processes										
Asahi Kasei Corp.	Japan	commercial		Taiwan	In operation	150,000 t/a	2007	polycarbonate s		
Audi AG		commercial (demonstration)	Werlte	Germany	in operation	300 Nm ³ /h / 3 MW	2013	methane		
Covestro AG	Germany	commercial	Dormagen	Germany	in operation	5,000 t/a	2016	polyols, polyurethanes		
Econic Technologies Ltd.	United Kingdom	commercial (demonstration)	Runcorn	United Kingdom	in operation		2018	polyols		
Newlight Technologies, Inc.	United States	commercial		United States	in operation	23,000 t/a	2014	polyhydroxyal kanoates		

Carbon utilisation



Chemical recycling of plastic waste

company	headquarter	scale		produc	start date	endproduct				
company			city / region	country	status	capacity	Start date	chaproduct		
Chemical CO ₂ conversion processes										
Arbeitsgemein- schaft Kohlenstoffkreis laufwirtschaft NRW (Arge K2 NRW)	Germany	commercial	NRW	Germany	planning			chemicals		
BASF SE	Germany	commercial (demonstratio n)	Ludwigshafen	Germany	in operation		2018	plastics		
Enerkem	Canada	commercial	Edmonton	Canada	in operation	31,000 t/a	2015, 2017	methanol, ethanol		
		commercial	Rotterdam	The Netherlands	planning	219,000 t/a		methanol		
		commercial	various	China	planning			methanol		
ReNewELP	United Kingdom	commercial	Teesside	United Kingdom	construction		2019	liquid hydrocarbons, chemicals, new plastics		
Showa Denko K.K.	Japan	commercial	Kawasaki	Japan	in operation		2003	CO ₂ for beverages		

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Polymers from Carbon Dioxide

Ways to Use CO₂ for Polymers





All figures available at www.bio-based.eu/markets



Polycarbonates



When we talk about Polycarbonates in the field of CCU we address mainly:

Aliphatic Polycabonates like

- Polyehtylencabonate (PEC)
- Polypropylencarbonate (PPC)
- Copolymers of both (PEPC)

Cycloaliphatic Polycarbonates, e.g.

polycyclohexene carbonate (PCHC)

Poly-Limonenecarbonate (PLimC)

Aromatic **Polycarbonate** (PC)







-> More in the presentation of Richard French / Econic

Several players for PEC/PPC:

Novomer (Saudi Aramco), Empower Materials, Econic, SK Innovation, ...



Aromatic Polycarbonate



Standard Process:





Flowchart of non-phosgene PC process with the DRC for DPC





Polylimonene carbonate





Source: Hauenstein et al. 2016, Williams et al. 2015



Polylimonene carbonate









Source: Hauenstein et al. 2016



Melt spun CO₂-TPU fibre filament processing: Direct knitting of TPU yarn and fabrics





-> more from Covestro





Dr. Pavan Manvi

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Electrocatalysis by Avantium



Acquisition of assets of Liquid Light puts Avantium in the leadership position in electrocatalysis technologies and carbon dioxide reduction1





Several options for high value products

Biotech: LanzaTech



LanzaTech's Commercial, Pilot Stage and Immediate Target Products



Biotech: BioRECO2VER







BioCONversion



New project *BioCOnversion*:

From emissions to a valuable feedstock for plastic precursors

The new project *BioCOnversion* unites multidisciplinary expertise from academia and industry in a cross-border consortium to make CO-containing process gases available for the production of added-value chemicals. The German Federal Ministry of Education and Research (BMBF) funded € 1.5 million to develop an innovative bioprocess to convert syngas into a defined plastic precursor by evaluating different technology approaches. The three years project coordinated by the open innovation cluster CLIB²⁰²¹ has been kicked-off end of May 2018 and is element of CLIB's internationalisation strategy within the cross-border BIG-Cluster initiative of the regions of the German state of North Rhine-Westphalia, the Netherlands and the Belgian region of Flanders.

ask Sarah Refai

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Thank you for your attention!



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