



# KaRMA2020 - Industrial Feather Waste Valorisation for Sustainable KeRatin-based MAterials

## Market survey: Future perspectives of the bio-based market and opportunities for KaRMA2020



CONNECTING AMBITIONS

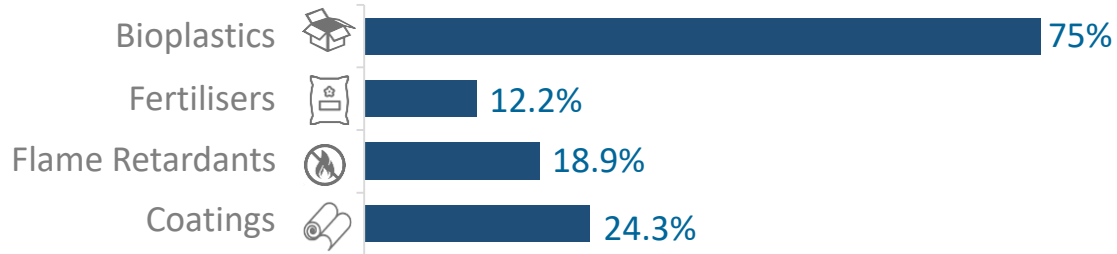
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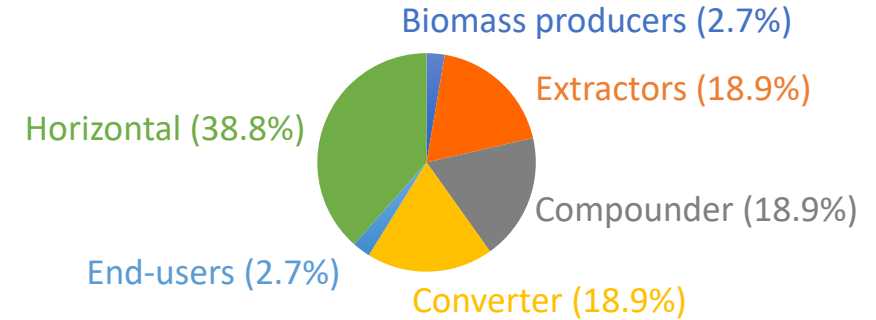
**MARKET SECTOR**

*40 respondents, mostly from the bioplastics sector, participated at the survey*



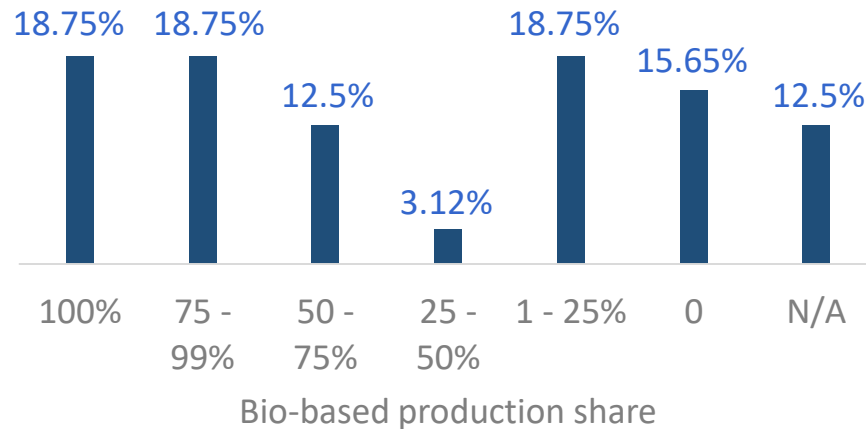
**VALUE CHAIN POSITION**

*The respondents covered all the value chain, from biomass producers to end-users*



**BIO-BASED PRODUCTION SHARE**

*More than the 70% of the participants already produces bio-based products*

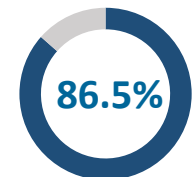


**INTEREST IN BIO-BASED PRODUCTION**

*All participants consider important to increase their bio-based production and the 86.5% is taking concrete measures*



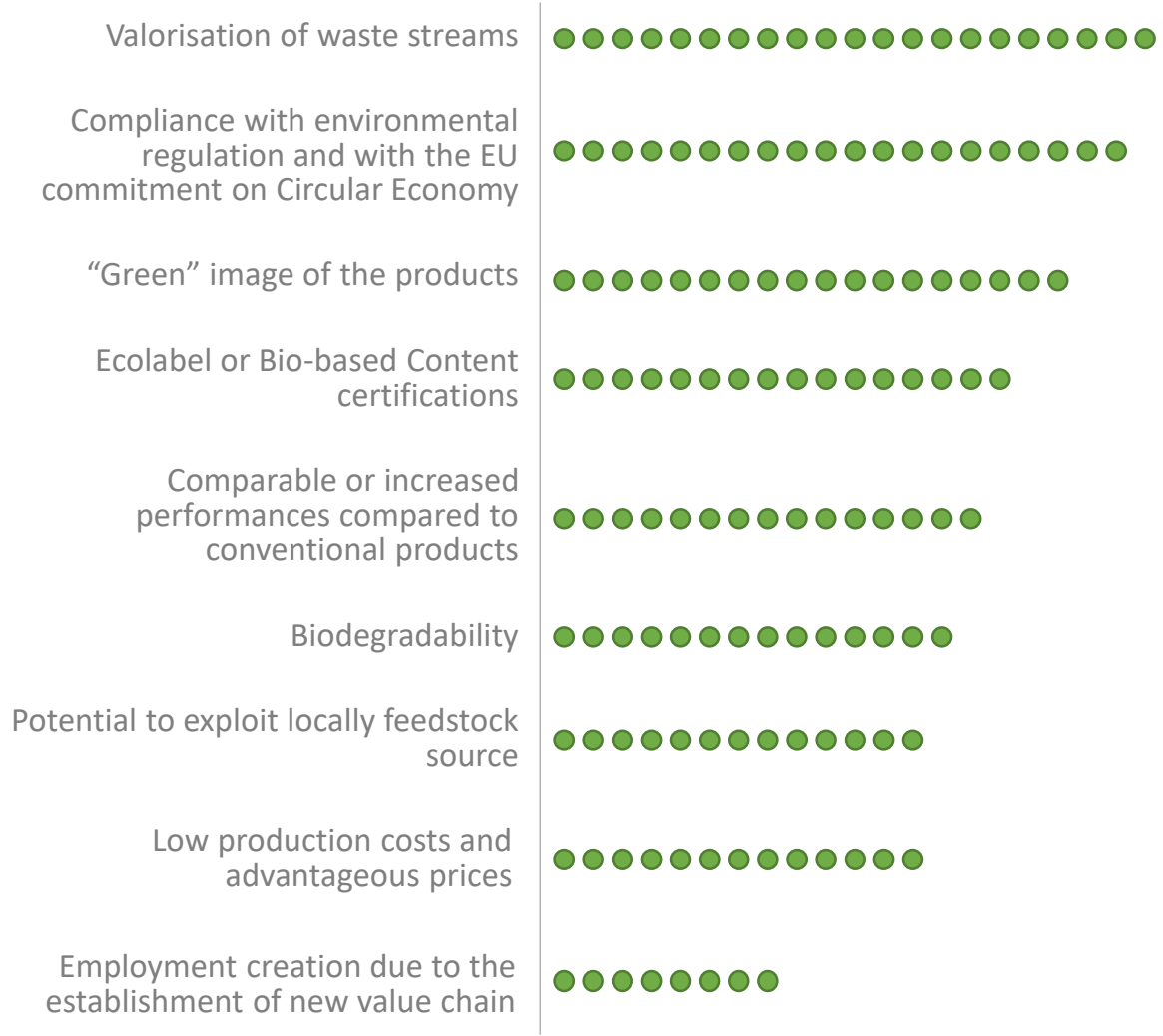
*The 100% of the respondents considers important increasing the bio-based production for its business*



*The 86.5% of respondents has already taken concrete measures to increase its bio-based production*

**MARKET DRIVERS**

*The valorisation of the waste stream is expected to be the main market driver for the KaRMA2020 products*



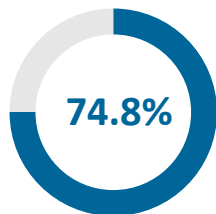
**MARKET BARRIERS**

*The costs factors are expected to be the main market barriers for the KaRMA2020 products*

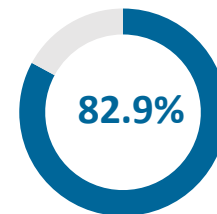


**ADOPTION OF BIO-BASED PRODUCTS FROM FEATHERS**

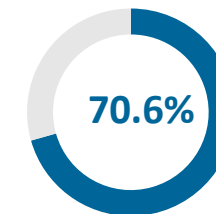
*Over than the 70% of the respondents has expressed willingness in adopting KaRMA2020 materials or products*



*The 74.8% of the participants would be willing to adopt feathers-based materials/products instead of the current ones*



*The 82.9% of the participants thinks that consumers will be interested in feathers-based products*

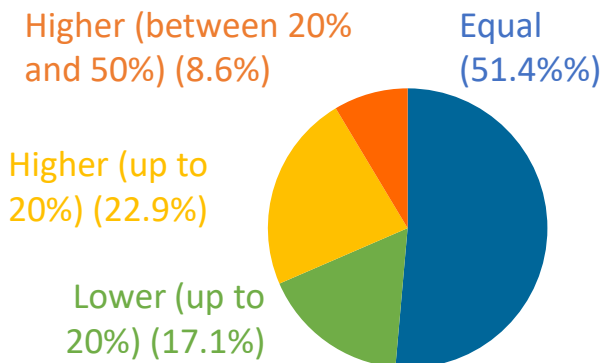


*The 70.6% of the participants considers that the possible adoption of feather-materials would positively affect the company*

**FINAL PRICE OF THE FEATHER-BASED PRODUCTS TO GAIN CONSUMERS ACCEPTANCE**

*Half of the respondents considers that the KaRMA2020 products should have an equal price compared to the fossil-based ones to gain consumers acceptance*

*What should be the final price of the feather-based products (compared to fossil-based) to gain consumers acceptance?*



**WHAT STAKEHOLDERS SAY ABOUT BIO-BASED MARKET:**

*"The bio-based market has to run quickly to be as competitive as possible. New technologies and new products are (going to be) deployed but the final cost of these products is still too high"*

*"Until the performance and price are not equal to fossil and synthetic based materials, there will not be reasonable market proliferation"*

*"It will grow"*

*"..Probably, in B2C scenarios the customers are more open to spend a bit more to have more environmentally friendly products, especially when higher quality and longer durability can make the difference"*

**SOME OF THE PARTICIPANTS AT THE SURVEY:**



Chimar Hellas S.A.



Corbion



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CRODA

