

# Global Crude Tall Oil Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Crude Tall Oil competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Crude Tall Oil (CTO), also called as liquid oil, is a by-product of kraft pulping process. Commercially, it is mainly used for fractionally distilled to manufacture Tall Oil Fatty Acids (TOFA) and Tall Oil Rosin (TOR). Global Crude Tall Oil key players include Kraton Corporation, Ingevity Corporation, Metsa, etc. Global top three manufacturers hold a share about 55%. Europe is the largest market, with a share about 45%, followed by North America and Asia-Pacific, both have a share about 50 percent. In terms of product, Softwood Crude Tall Oil is the largest segment, with a share about 90%. And in terms of application, the largest application is CTO Distillation, followed by CTO Biofuels. Market Drivers: The growth of the crude tall oil (CTO) market is primarily driven by increasing global demand for bio-based materials, particularly in high-value applications such as biofuels (e.g., aviation and marine fuels), rosin acids, and fatty acids. Supportive policies (e.g., EU RED II, U.S. RFS), expanding pulp production capacity, and CTO's cost advantage over vegetable oils further propel market expansion. Market Trends: The industry is shifting toward higher-value processing, with pulp manufacturers integrating downstream to enhance fractionation technologies for purer derivatives. Regionally, Europe and North America lead in biofuel demand, while Asia-Pacific's chemical sector fuels import growth. Sustainability certifications and biorefinery models are emerging as key trends, though supply concentration and competition from substitutes remain potential challenges.

The global Crude Tall Oil market size was estimated at USD 874.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 8.00% during the

forecast period.

This report offers a comprehensive and in-depth analysis of the global Crude Tall Oil market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Crude Tall Oil market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Crude Tall Oil market.

### **Global Crude Tall Oil Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Kraton Corporation (DL Chemical)  
Ingevity Corporation  
Metsa  
UPM  
Torgoviy Dom Lesokhimik  
Resitol Chemical Industry  
Pitzavod  
OJSC  
Mondi Group  
Stora Enso  
Smurfit Kappa  
Oji Holding  
Mercer International

### **Market Segmentation (by Type)**

Softwood Crude Tall Oil  
Mixed Crude Tall Oil  
Hardwood Crude Tall Oil

### **Market Segmentation (by Application)**

CTO Distillation  
CTO Biofuels  
Others

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)  
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance

Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the Crude Tall Oil Market  
Overview of the regional outlook of the Crude Tall Oil Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Crude Tall Oil Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help

readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Crude Tall Oil, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights,

product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

- 1.1 Market Definition and Statistical Scope of Crude Tall Oil
- 1.2 Key Market Segments
  - 1.2.1 Crude Tall Oil Segment by Type
  - 1.2.2 Crude Tall Oil Segment by Application
- 1.3 Methodology & Sources of Information
  - 1.3.1 Research Methodology
  - 1.3.2 Research Process
  - 1.3.3 Market Breakdown and Data Triangulation
  - 1.3.4 Base Year
  - 1.3.5 Report Assumptions & Caveats

### **2 CRUDE TALL OIL MARKET OVERVIEW**

- 2.1 Global Market Overview
  - 2.1.1 Global Crude Tall Oil Market Size (M USD) Estimates and Forecasts (2020-2035)
  - 2.1.2 Global Crude Tall Oil Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

### **3 CRUDE TALL OIL MARKET COMPETITIVE LANDSCAPE**

- 3.1 Company Assessment Quadrant
- 3.2 Global Crude Tall Oil Product Life Cycle
- 3.3 Global Crude Tall Oil Sales by Manufacturers (2020-2025)
- 3.4 Global Crude Tall Oil Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Crude Tall Oil Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Crude Tall Oil Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Crude Tall Oil Market Competitive Situation and Trends
  - 3.8.1 Crude Tall Oil Market Concentration Rate
  - 3.8.2 Global 5 and 10 Largest Crude Tall Oil Players Market Share by Revenue
  - 3.8.3 Mergers & Acquisitions, Expansion

### **4 CRUDE TALL OIL INDUSTRY CHAIN ANALYSIS**

- 4.1 Crude Tall Oil Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF CRUDE TALL OIL MARKET**

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
  - 5.4.1 New Product Developments
  - 5.4.2 Mergers & Acquisitions
  - 5.4.3 Expansions
  - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
  - 5.5.1 Industry Policies Analysis
  - 5.5.2 Economic Environment Analysis
  - 5.5.3 Social Environment Analysis
  - 5.5.4 Technological Environment Analysis
- 5.6 Global Crude Tall Oil Market Porter's Five Forces Analysis
  - 5.6.1 Global Trade Frictions
  - 5.6.2 U.S. Tariff Policy ? April 2025
  - 5.6.3 Global Trade Frictions and Their Impacts to Crude Tall Oil Market
- 5.7 ESG Ratings of Leading Companies

## **6 CRUDE TALL OIL MARKET SEGMENTATION BY TYPE**

- 6.1 Evaluation Matrix of Segment Market Development Potential (Type)
- 6.2 Global Crude Tall Oil Sales Market Share by Type (2020-2025)
- 6.3 Global Crude Tall Oil Market Size by Type (2020-2025)
- 6.4 Global Crude Tall Oil Price by Type (2020-2025)

## **7 CRUDE TALL OIL MARKET SEGMENTATION BY APPLICATION**

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Crude Tall Oil Market Sales by Application (2020-2025)
- 7.3 Global Crude Tall Oil Market Size (M USD) by Application (2020-2025)

## 7.4 Global Crude Tall Oil Sales Growth Rate by Application (2020-2025)

# **8 CRUDE TALL OIL MARKET SALES BY REGION**

## 8.1 Global Crude Tall Oil Sales by Region

### 8.1.1 Global Crude Tall Oil Sales by Region

### 8.1.2 Global Crude Tall Oil Sales Market Share by Region

## 8.2 Global Crude Tall Oil Market Size by Region

### 8.2.1 Global Crude Tall Oil Market Size by Region

### 8.2.2 Global Crude Tall Oil Market Size by Region

## 8.3 North America

### 8.3.1 North America Crude Tall Oil Sales by Country

### 8.3.2 North America Crude Tall Oil Market Size by Country

### 8.3.3 U.S. Market Overview

### 8.3.4 Canada Market Overview

### 8.3.5 Mexico Market Overview

## 8.4 Europe

### 8.4.1 Europe Crude Tall Oil Sales by Country

### 8.4.2 Europe Crude Tall Oil Market Size by Country

### 8.4.3 Germany Market Overview

### 8.4.4 France Market Overview

### 8.4.5 U.K. Market Overview

### 8.4.6 Italy Market Overview

### 8.4.7 Spain Market Overview

## 8.5 Asia Pacific

### 8.5.1 Asia Pacific Crude Tall Oil Sales by Region

### 8.5.2 Asia Pacific Crude Tall Oil Market Size by Region

### 8.5.3 China Market Overview

### 8.5.4 Japan Market Overview

### 8.5.5 South Korea Market Overview

### 8.5.6 India Market Overview

### 8.5.7 Southeast Asia Market Overview

## 8.6 South America

### 8.6.1 South America Crude Tall Oil Sales by Country

### 8.6.2 South America Crude Tall Oil Market Size by Country

### 8.6.3 Brazil Market Overview

### 8.6.4 Argentina Market Overview

### 8.6.5 Columbia Market Overview

## 8.7 Middle East and Africa

- 8.7.1 Middle East and Africa Crude Tall Oil Sales by Region
- 8.7.2 Middle East and Africa Crude Tall Oil Market Size by Region
- 8.7.3 Saudi Arabia Market Overview
- 8.7.4 UAE Market Overview
- 8.7.5 Egypt Market Overview
- 8.7.6 Nigeria Market Overview
- 8.7.7 South Africa Market Overview

## **9 CRUDE TALL OIL MARKET PRODUCTION BY REGION**

- 9.1 Global Production of Crude Tall Oil by Region(2020-2025)
- 9.2 Global Crude Tall Oil Revenue Market Share by Region (2020-2025)
- 9.3 Global Crude Tall Oil Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Crude Tall Oil Production
  - 9.4.1 North America Crude Tall Oil Production Growth Rate (2020-2025)
  - 9.4.2 North America Crude Tall Oil Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Crude Tall Oil Production
  - 9.5.1 Europe Crude Tall Oil Production Growth Rate (2020-2025)
  - 9.5.2 Europe Crude Tall Oil Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Crude Tall Oil Production (2020-2025)
  - 9.6.1 Japan Crude Tall Oil Production Growth Rate (2020-2025)
  - 9.6.2 Japan Crude Tall Oil Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Crude Tall Oil Production (2020-2025)
  - 9.7.1 China Crude Tall Oil Production Growth Rate (2020-2025)
  - 9.7.2 China Crude Tall Oil Production, Revenue, Price and Gross Margin (2020-2025)

## **10 KEY COMPANIES PROFILE**

- 10.1 Kraton Corporation (DL Chemical)
  - 10.1.1 Kraton Corporation (DL Chemical) Basic Information
  - 10.1.2 Kraton Corporation (DL Chemical) Crude Tall Oil Product Overview
  - 10.1.3 Kraton Corporation (DL Chemical) Crude Tall Oil Product Market Performance
  - 10.1.4 Kraton Corporation (DL Chemical) Business Overview
  - 10.1.5 Kraton Corporation (DL Chemical) SWOT Analysis
  - 10.1.6 Kraton Corporation (DL Chemical) Recent Developments
- 10.2 Ingevity Corporation
  - 10.2.1 Ingevity Corporation Basic Information

- 10.2.2 Ingevity Corporation Crude Tall Oil Product Overview
- 10.2.3 Ingevity Corporation Crude Tall Oil Product Market Performance
- 10.2.4 Ingevity Corporation Business Overview
- 10.2.5 Ingevity Corporation SWOT Analysis
- 10.2.6 Ingevity Corporation Recent Developments
- 10.3 Metsa
  - 10.3.1 Metsa Basic Information
  - 10.3.2 Metsa Crude Tall Oil Product Overview
  - 10.3.3 Metsa Crude Tall Oil Product Market Performance
  - 10.3.4 Metsa Business Overview
  - 10.3.5 Metsa SWOT Analysis
  - 10.3.6 Metsa Recent Developments
- 10.4 UPM
  - 10.4.1 UPM Basic Information
  - 10.4.2 UPM Crude Tall Oil Product Overview
  - 10.4.3 UPM Crude Tall Oil Product Market Performance
  - 10.4.4 UPM Business Overview
  - 10.4.5 UPM Recent Developments
- 10.5 Torgoviy Dom Lesokhimik
  - 10.5.1 Torgoviy Dom Lesokhimik Basic Information
  - 10.5.2 Torgoviy Dom Lesokhimik Crude Tall Oil Product Overview
  - 10.5.3 Torgoviy Dom Lesokhimik Crude Tall Oil Product Market Performance
  - 10.5.4 Torgoviy Dom Lesokhimik Business Overview
  - 10.5.5 Torgoviy Dom Lesokhimik Recent Developments
- 10.6 Resitol Chemical Industry
  - 10.6.1 Resitol Chemical Industry Basic Information
  - 10.6.2 Resitol Chemical Industry Crude Tall Oil Product Overview
  - 10.6.3 Resitol Chemical Industry Crude Tall Oil Product Market Performance
  - 10.6.4 Resitol Chemical Industry Business Overview
  - 10.6.5 Resitol Chemical Industry Recent Developments
- 10.7 Pitzavod
  - 10.7.1 Pitzavod Basic Information
  - 10.7.2 Pitzavod Crude Tall Oil Product Overview
  - 10.7.3 Pitzavod Crude Tall Oil Product Market Performance
  - 10.7.4 Pitzavod Business Overview
  - 10.7.5 Pitzavod Recent Developments
- 10.8 OJSC
  - 10.8.1 OJSC Basic Information
  - 10.8.2 OJSC Crude Tall Oil Product Overview

- 10.8.3 OJSC Crude Tall Oil Product Market Performance
- 10.8.4 OJSC Business Overview
- 10.8.5 OJSC Recent Developments
- 10.9 Mondi Group
  - 10.9.1 Mondi Group Basic Information
  - 10.9.2 Mondi Group Crude Tall Oil Product Overview
  - 10.9.3 Mondi Group Crude Tall Oil Product Market Performance
  - 10.9.4 Mondi Group Business Overview
  - 10.9.5 Mondi Group Recent Developments
- 10.10 Stora Enso
  - 10.10.1 Stora Enso Basic Information
  - 10.10.2 Stora Enso Crude Tall Oil Product Overview
  - 10.10.3 Stora Enso Crude Tall Oil Product Market Performance
  - 10.10.4 Stora Enso Business Overview
  - 10.10.5 Stora Enso Recent Developments
- 10.11 Smurfit Kappa
  - 10.11.1 Smurfit Kappa Basic Information
  - 10.11.2 Smurfit Kappa Crude Tall Oil Product Overview
  - 10.11.3 Smurfit Kappa Crude Tall Oil Product Market Performance
  - 10.11.4 Smurfit Kappa Business Overview
  - 10.11.5 Smurfit Kappa Recent Developments
- 10.12 Oji Holding
  - 10.12.1 Oji Holding Basic Information
  - 10.12.2 Oji Holding Crude Tall Oil Product Overview
  - 10.12.3 Oji Holding Crude Tall Oil Product Market Performance
  - 10.12.4 Oji Holding Business Overview
  - 10.12.5 Oji Holding Recent Developments
- 10.13 Mercer International
  - 10.13.1 Mercer International Basic Information
  - 10.13.2 Mercer International Crude Tall Oil Product Overview
  - 10.13.3 Mercer International Crude Tall Oil Product Market Performance
  - 10.13.4 Mercer International Business Overview
  - 10.13.5 Mercer International Recent Developments

## **11 CRUDE TALL OIL MARKET FORECAST BY REGION**

- 11.1 Global Crude Tall Oil Market Size Forecast
- 11.2 Global Crude Tall Oil Market Forecast by Region
  - 11.2.1 North America Market Size Forecast by Country

- 11.2.2 Europe Crude Tall Oil Market Size Forecast by Country
- 11.2.3 Asia Pacific Crude Tall Oil Market Size Forecast by Region
- 11.2.4 South America Crude Tall Oil Market Size Forecast by Country
- 11.2.5 Middle East and Africa Forecasted Sales of Crude Tall Oil by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

- 12.1 Global Crude Tall Oil Market Forecast by Type (2026-2035)
  - 12.1.1 Global Forecasted Sales of Crude Tall Oil by Type (2026-2035)
  - 12.1.2 Global Crude Tall Oil Market Size Forecast by Type (2026-2035)
  - 12.1.3 Global Forecasted Price of Crude Tall Oil by Type (2026-2035)
- 12.2 Global Crude Tall Oil Market Forecast by Application (2026-2035)
  - 12.2.1 Global Crude Tall Oil Sales (K MT) Forecast by Application
  - 12.2.2 Global Crude Tall Oil Market Size (M USD) Forecast by Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

- Table 1. Introduction of the Type
- Table 2. Introduction of the Application
- Table 3. Global Crude Tall Oil Market Size by Type (M USD)
- Table 4. Global Crude Tall Oil Market Size by Application
- Table 5. Crude Tall Oil Market Size Comparison by Region (M USD)
- Table 6. Global Crude Tall Oil Sales (K MT) by Manufacturers (2020-2025)
- Table 7. Global Crude Tall Oil Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global Crude Tall Oil Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global Crude Tall Oil Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Crude Tall Oil as of 2025)
- Table 11. Global Market Crude Tall Oil Average Price (USD/KG) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global Crude Tall Oil Manufacturers Market Concentration Ratio (CR5 and HHI)
- Table 15. Mergers & Acquisitions, Expansion Plans
- Table 16. Market Overview of Key Raw Materials
- Table 17. Midstream Market Analysis
- Table 18. Downstream Customer Analysis
- Table 19. Key Development Trends
- Table 20. Driving Factors
- Table 21. Crude Tall Oil Market Challenges
- Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
- Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
- Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
- Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
- Table 26. Global Crude Tall Oil Sales by Type (K MT)
- Table 27. Global Crude Tall Oil Market Size by Type (M USD)
- Table 28. Global Crude Tall Oil Sales (K MT) by Type (2020-2025)
- Table 29. Global Crude Tall Oil Sales Market Share by Type (2020-2025)
- Table 30. Global Crude Tall Oil Market Size (M USD) by Type (2020-2025)
- Table 31. Global Crude Tall Oil Market Share by Type (2020-2025)

- Table 32. Global Crude Tall Oil Price (USD/KG) by Type (2020-2025)
- Table 33. Global Crude Tall Oil Sales (K MT) by Application
- Table 34. Global Crude Tall Oil Market Size by Application
- Table 35. Global Crude Tall Oil Sales by Application (2020-2025) & (K MT)
- Table 36. Global Crude Tall Oil Sales Market Share by Application (2020-2025)
- Table 37. Global Crude Tall Oil Market Size by Application (2020-2025) & (M USD)
- Table 38. Global Crude Tall Oil Market Share by Application (2020-2025)
- Table 39. Global Crude Tall Oil Sales Growth Rate by Application (2020-2025)
- Table 40. Global Crude Tall Oil Sales by Region (2020-2025) & (K MT)
- Table 41. Global Crude Tall Oil Sales Market Share by Region (2020-2025)
- Table 42. Global Crude Tall Oil Market Size by Region (2020-2025) & (M USD)
- Table 43. Global Crude Tall Oil Market Size by Region (2020-2025)
- Table 44. North America Crude Tall Oil Sales by Country (2020-2025) & (K MT)
- Table 45. North America Crude Tall Oil Market Size by Country (2020-2025) & (M USD)
- Table 46. Europe Crude Tall Oil Sales by Country (2020-2025) & (K MT)
- Table 47. Europe Crude Tall Oil Market Size by Country (2020-2025) & (M USD)
- Table 48. Asia Pacific Crude Tall Oil Sales by Region (2020-2025) & (K MT)
- Table 49. Asia Pacific Crude Tall Oil Market Size by Region (2020-2025) & (M USD)
- Table 50. South America Crude Tall Oil Sales by Country (2020-2025) & (K MT)
- Table 51. South America Crude Tall Oil Market Size by Country (2020-2025) & (M USD)
- Table 52. Middle East and Africa Crude Tall Oil Sales by Region (2020-2025) & (K MT)
- Table 53. Middle East and Africa Crude Tall Oil Market Size by Region (2020-2025) & (M USD)
- Table 54. Global Crude Tall Oil Production (K MT) by Region(2020-2025)
- Table 55. Global Crude Tall Oil Revenue (US\$ Million) by Region (2020-2025)
- Table 56. Global Crude Tall Oil Revenue Market Share by Region (2020-2025)
- Table 57. Global Crude Tall Oil Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 58. North America Crude Tall Oil Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 59. Europe Crude Tall Oil Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 60. Japan Crude Tall Oil Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 61. China Crude Tall Oil Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)
- Table 62. Kraton Corporation (DL Chemical) Basic Information
- Table 63. Kraton Corporation (DL Chemical) Crude Tall Oil Product Overview
- Table 64. Kraton Corporation (DL Chemical) Crude Tall Oil Sales (K MT), Revenue (M

USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 65. Kraton Corporation (DL Chemical) Business Overview

Table 66. Kraton Corporation (DL Chemical) SWOT Analysis

Table 67. Kraton Corporation (DL Chemical) Recent Developments

Table 68. Ingevity Corporation Basic Information

Table 69. Ingevity Corporation Crude Tall Oil Product Overview

Table 70. Ingevity Corporation Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 71. Ingevity Corporation Business Overview

Table 72. Ingevity Corporation SWOT Analysis

Table 73. Ingevity Corporation Recent Developments

Table 74. Metsa Basic Information

Table 75. Metsa Crude Tall Oil Product Overview

Table 76. Metsa Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 77. Metsa Business Overview

Table 78. Metsa SWOT Analysis

Table 79. Metsa Recent Developments

Table 80. UPM Basic Information

Table 81. UPM Crude Tall Oil Product Overview

Table 82. UPM Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 83. UPM Business Overview

Table 84. UPM Recent Developments

Table 85. Torgoviy Dom Lesokhimik Basic Information

Table 86. Torgoviy Dom Lesokhimik Crude Tall Oil Product Overview

Table 87. Torgoviy Dom Lesokhimik Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 88. Torgoviy Dom Lesokhimik Business Overview

Table 89. Torgoviy Dom Lesokhimik Recent Developments

Table 90. Resitol Chemical Industry Basic Information

Table 91. Resitol Chemical Industry Crude Tall Oil Product Overview

Table 92. Resitol Chemical Industry Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 93. Resitol Chemical Industry Business Overview

Table 94. Resitol Chemical Industry Recent Developments

Table 95. Pitzavod Basic Information

Table 96. Pitzavod Crude Tall Oil Product Overview

Table 97. Pitzavod Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG)

and Gross Margin (2020-2025)

Table 98. Pitzavod Business Overview

Table 99. Pitzavod Recent Developments

Table 100. OJSC Basic Information

Table 101. OJSC Crude Tall Oil Product Overview

Table 102. OJSC Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 103. OJSC Business Overview

Table 104. OJSC Recent Developments

Table 105. Mondi Group Basic Information

Table 106. Mondi Group Crude Tall Oil Product Overview

Table 107. Mondi Group Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 108. Mondi Group Business Overview

Table 109. Mondi Group Recent Developments

Table 110. Stora Enso Basic Information

Table 111. Stora Enso Crude Tall Oil Product Overview

Table 112. Stora Enso Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 113. Stora Enso Business Overview

Table 114. Stora Enso Recent Developments

Table 115. Smurfit Kappa Basic Information

Table 116. Smurfit Kappa Crude Tall Oil Product Overview

Table 117. Smurfit Kappa Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 118. Smurfit Kappa Business Overview

Table 119. Smurfit Kappa Recent Developments

Table 120. Oji Holding Basic Information

Table 121. Oji Holding Crude Tall Oil Product Overview

Table 122. Oji Holding Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 123. Oji Holding Business Overview

Table 124. Oji Holding Recent Developments

Table 125. Mercer International Basic Information

Table 126. Mercer International Crude Tall Oil Product Overview

Table 127. Mercer International Crude Tall Oil Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 128. Mercer International Business Overview

Table 129. Mercer International Recent Developments

Table 130. Global Crude Tall Oil Sales Forecast by Region (2026-2035) & (K MT)

Table 131. Global Crude Tall Oil Market Size Forecast by Region (2026-2035) & (M USD)

Table 132. North America Crude Tall Oil Sales Forecast by Country (2026-2035) & (K MT)

Table 133. North America Crude Tall Oil Market Size Forecast by Country (2026-2035) & (M USD)

Table 134. Europe Crude Tall Oil Sales Forecast by Country (2026-2035) & (K MT)

Table 135. Europe Crude Tall Oil Market Size Forecast by Country (2026-2035) & (M USD)

Table 136. Asia Pacific Crude Tall Oil Sales Forecast by Region (2026-2035) & (K MT)

Table 137. Asia Pacific Crude Tall Oil Market Size Forecast by Region (2026-2035) & (M USD)

Table 138. South America Crude Tall Oil Sales Forecast by Country (2026-2035) & (K MT)

Table 139. South America Crude Tall Oil Market Size Forecast by Country (2026-2035) & (M USD)

Table 140. Middle East and Africa Crude Tall Oil Sales Forecast by Country (2026-2035) & (Units)

Table 141. Middle East and Africa Crude Tall Oil Market Size Forecast by Country (2026-2035) & (M USD)

Table 142. Global Crude Tall Oil Sales Forecast by Type (2026-2035) & (K MT)

Table 143. Global Crude Tall Oil Market Size Forecast by Type (2026-2035) & (M USD)

Table 144. Global Crude Tall Oil Price Forecast by Type (2026-2035) & (USD/KG)

Table 145. Global Crude Tall Oil Sales (K MT) Forecast by Application (2026-2035)

Table 146. Global Crude Tall Oil Market Size Forecast by Application (2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of Crude Tall Oil
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Crude Tall Oil Market Size (M USD), 2025-2035
- Figure 5. Global Crude Tall Oil Market Size (M USD) (2020-2035)
- Figure 6. Global Crude Tall Oil Sales (K MT) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Crude Tall Oil Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Crude Tall Oil Product Life Cycle
- Figure 13. Crude Tall Oil Sales Share by Manufacturers in 2025
- Figure 14. Global Crude Tall Oil Revenue Share by Manufacturers in 2025
- Figure 15. Crude Tall Oil Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Crude Tall Oil Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Crude Tall Oil Revenue in 2025
- Figure 18. Industry Chain Map of Crude Tall Oil
- Figure 19. Global Crude Tall Oil Market PEST Analysis
- Figure 20. Global Crude Tall Oil Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Crude Tall Oil Market Share by Type
- Figure 27. Sales Market Share of Crude Tall Oil by Type (2020-2025)
- Figure 28. Sales Market Share of Crude Tall Oil by Type in 2025
- Figure 29. Market Share of Crude Tall Oil by Type (2020-2025)
- Figure 30. Market Share of Crude Tall Oil by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Crude Tall Oil Market Share by Application

- Figure 33. Global Crude Tall Oil Sales Market Share by Application (2020-2025)
- Figure 34. Global Crude Tall Oil Sales Market Share by Application in 2025
- Figure 35. Global Crude Tall Oil Market Share by Application (2020-2025)
- Figure 36. Global Crude Tall Oil Market Share by Application in 2025
- Figure 37. Global Crude Tall Oil Sales Growth Rate by Application (2020-2025)
- Figure 38. Global Crude Tall Oil Sales Market Share by Region (2020-2025)
- Figure 39. Global Crude Tall Oil Market Size by Region (2020-2025)
- Figure 40. North America Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 41. North America Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 42. North America Crude Tall Oil Sales Market Share by Country in 2024
- Figure 43. North America Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 44. North America Crude Tall Oil Market Size by Country in 2024
- Figure 45. U.S. Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 46. U.S. Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 47. Canada Crude Tall Oil Sales (K MT) and Growth Rate (2020-2025)
- Figure 48. Canada Crude Tall Oil Market Size (M USD) and Growth Rate (2020-2025)
- Figure 49. Mexico Crude Tall Oil Sales (Units) and Growth Rate (2020-2025)
- Figure 50. Mexico Crude Tall Oil Market Size (Units) and Growth Rate (2020-2025)
- Figure 51. Europe Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 52. Europe Crude Tall Oil Sales Market Share by Country in 2024
- Figure 53. Europe Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 54. Europe Crude Tall Oil Market Size by Country in 2024
- Figure 55. Germany Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 56. Germany Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 57. France Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 58. France Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 59. U.K. Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 60. U.K. Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 61. Italy Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 62. Italy Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 63. Spain Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 64. Spain Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 65. Asia Pacific Crude Tall Oil Sales and Growth Rate (K MT)
- Figure 66. Asia Pacific Crude Tall Oil Sales Market Share by Region in 2024
- Figure 67. Asia Pacific Crude Tall Oil Market Size by Region in 2024
- Figure 68. China Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 69. China Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)

- Figure 70. Japan Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 71. Japan Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 72. South Korea Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 73. South Korea Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 74. India Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 75. India Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 76. Southeast Asia Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 77. Southeast Asia Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 78. South America Crude Tall Oil Sales and Growth Rate (K MT)
- Figure 79. South America Crude Tall Oil Sales Market Share by Country in 2024
- Figure 80. South America Crude Tall Oil Market Size and Growth Rate (M USD)
- Figure 81. South America Crude Tall Oil Market Size by Country in 2024
- Figure 82. Brazil Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 83. Brazil Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 84. Argentina Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 85. Argentina Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 86. Columbia Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 87. Columbia Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 88. Middle East and Africa Crude Tall Oil Sales and Growth Rate (K MT)
- Figure 89. Middle East and Africa Crude Tall Oil Sales Market Share by Region in 2024
- Figure 90. Middle East and Africa Crude Tall Oil Market Size and Growth Rate (M USD)
- Figure 91. Middle East and Africa Crude Tall Oil Market Size by Region in 2024
- Figure 92. Saudi Arabia Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 93. Saudi Arabia Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 94. UAE Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 95. UAE Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 96. Egypt Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 97. Egypt Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 98. Nigeria Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 99. Nigeria Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 100. South Africa Crude Tall Oil Sales and Growth Rate (2020-2025) & (K MT)
- Figure 101. South Africa Crude Tall Oil Market Size and Growth Rate (2020-2025) & (M USD)
- Figure 102. Global Crude Tall Oil Production Market Share by Region (2020-2025)

Figure 103. North America Crude Tall Oil Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe Crude Tall Oil Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan Crude Tall Oil Production (K MT) Growth Rate (2020-2025)

Figure 106. China Crude Tall Oil Production (K MT) Growth Rate (2020-2025)

Figure 107. Global Crude Tall Oil Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global Crude Tall Oil Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Crude Tall Oil Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Crude Tall Oil Market Share Forecast by Type (2026-2035)

Figure 111. Global Crude Tall Oil Sales Forecast by Application (2026-2035)

Figure 112. Global Crude Tall Oil Market Share Forecast by Application (2026-2035)

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