

Global Natural Oil-Based Polyol 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 Natural Oil-Based Polyol competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Natural oil polyols, also known as NOPs or biopolyols, are polyols derived from vegetable oils by several different techniques. The primary use for these materials is in the production of polyurethanes. In terms of raw materials, the upstream materials for Natural Oil-Based Polyols include a variety of natural vegetable oils such as soybean oil, castor oil, rapeseed oil, and palm oil. These renewable inputs ensure a sustainable supply chain and allow manufacturers to meet various environmental and performance requirements. Major global suppliers of these raw materials include ADM, IOI Group, and Wilmar, which provide stable and scalable sourcing for the industry. Downstream, Natural Oil-Based Polyols find applications in multiple sectors including furniture and bedding (e.g., flexible foams), construction and insulation (e.g., rigid foam panels), automotive (e.g., seating and interior components), packaging, and carpet backing, among others. Leading customers include major polyurethane and materials companies such as Dow, BASF, Covestro, Huntsman, Recticel, and FXI. The typical gross profit margin for Natural Oil-Based Polyols ranges from 15% to 30%, depending on the type and application. In 2024, global Natural Oil-Based Polyols production reached approximately 530.76 K ton, with an average global market price of around US\$ 2380 per ton. The Natural Oil-Based Polyols market is mainly segmented into Polyether Polyols and Polyester Polyols, with Polyether Natural Oil-Based Polyols being the dominant product type, expected to hold 78% of the global market share by 2024. This category drives market growth due to its superior performance and wide range of applications. In terms of raw materials, Natural Oil-Based Polyols are primarily derived from natural plant oils such as soybean oil, castor oil, rapeseed oil, and palm oil.

Castor Oil Natural Oil-Based Polyols stand out as the leading raw material, projected to account for 38% of the global market share in 2024, owing to their unique properties and reliable supply. Other bio-based polyols hold smaller but gradually growing market shares. The applications of Natural Oil-Based Polyols span furniture and bedding, construction and insulation, automotive, packaging, carpet backing, and other industries. The automotive sector is the largest application market, expected to capture 27% of the global share by 2024, reflecting strong demand for environmentally friendly and high-performance materials in vehicle manufacturing. Stable demand from the furniture and construction sectors also supports the market's growth. Geographically, North America is the largest consumer market, holding 42% of the global share, benefiting from advanced technology development and supportive policies. The performance of the North American market plays a crucial role in driving the global Natural Oil-Based Polyols industry forward. Market growth is propelled by increasing global awareness of environmental protection and rising demand for sustainable materials, especially in automotive and construction industries where green trends are significant. Governments worldwide are enforcing stricter environmental regulations and carbon emission standards, encouraging companies to adopt bio-based polyols as alternatives to conventional petrochemical polyols. Polyether Natural Oil-Based Polyols meet the high-performance requirements of various industrial applications, while Castor Oil Natural Oil-Based Polyols serve as a critical raw material due to their abundant natural sources and excellent properties. Policy support and technological innovation in North America further stimulate the global market vitality. Despite promising prospects, the Natural Oil-Based Polyols market faces challenges. Raw material prices are highly susceptible to climate variability and crop yield fluctuations, resulting in cost instability and increased production risks. Some bio-based polyols have yet to fully match the performance standards of traditional petrochemical counterparts, limiting their penetration in certain high-end applications. The complexity of production processes and high technical barriers hinder further market expansion. Additionally, uneven policy support and market acceptance across regions require improved infrastructure and regulatory guidance outside North America to better foster healthy market growth.

The global Natural Oil-Based Polyol market size was estimated at USD 1263.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 7.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Natural Oil-Based Polyol 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 Natural Oil-Based Polyol 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 Natural Oil-Based Polyol market.

Global Natural Oil-Based Polyol 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

BASF

Cargill Inc

MCNS

Emery Oleochemicals

Alberdingk Boley

Jayant Agro-Organics Limited

Maskimi (Bina Puri)
Hairma
Stahl
Polylabs
Xuchuan Chemical
Aurorium
NivaPol
MCPU Polymer
EDB Poliois Vegetais

Market Segmentation (by Type)

Polyether Polyols
Polyester Polyols

Market Segmentation (by Application)

Furniture and Bedding
Construction and Insulation
Automotive
Packaging
Carpet Backing
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 Natural Oil-Based Polyol Market
Overview of the regional outlook of the Natural Oil-Based Polyol 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 Natural Oil-Based Polyol 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 Natural Oil-Based Polyol, 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

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

1.1 Market Definition and Statistical Scope of Natural Oil-Based Polyol

1.2 Key Market Segments

1.2.1 Natural Oil-Based Polyol Segment by Type

1.2.2 Natural Oil-Based Polyol 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 NATURAL OIL-BASED POLYOL MARKET OVERVIEW

2.1 Global Market Overview

2.1.1 Global Natural Oil-Based Polyol Market Size (M USD) Estimates and Forecasts (2020-2035)

2.1.2 Global Natural Oil-Based Polyol Sales Estimates and Forecasts (2020-2035)

2.2 Market Segment Executive Summary

2.3 Global Market Size by Region

3 NATURAL OIL-BASED POLYOL MARKET COMPETITIVE LANDSCAPE

3.1 Company Assessment Quadrant

3.2 Global Natural Oil-Based Polyol Product Life Cycle

3.3 Global Natural Oil-Based Polyol Sales by Manufacturers (2020-2025)

3.4 Global Natural Oil-Based Polyol Revenue Market Share by Manufacturers (2020-2025)

3.5 Natural Oil-Based Polyol Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

3.6 Global Natural Oil-Based Polyol Average Price by Manufacturers (2020-2025)

3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types

3.8 Natural Oil-Based Polyol Market Competitive Situation and Trends

3.8.1 Natural Oil-Based Polyol Market Concentration Rate

3.8.2 Global 5 and 10 Largest Natural Oil-Based Polyol Players Market Share by Revenue

3.8.3 Mergers & Acquisitions, Expansion

4 NATURAL OIL-BASED POLYOL INDUSTRY CHAIN ANALYSIS

- 4.1 Natural Oil-Based Polyol 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 NATURAL OIL-BASED POLYOL 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 Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Market
- 5.7 ESG Ratings of Leading Companies

6 NATURAL OIL-BASED POLYOL MARKET SEGMENTATION BY TYPE

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

7 NATURAL OIL-BASED POLYOL MARKET SEGMENTATION BY APPLICATION

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Natural Oil-Based Polyol Market Sales by Application (2020-2025)
- 7.3 Global Natural Oil-Based Polyol Market Size (M USD) by Application (2020-2025)
- 7.4 Global Natural Oil-Based Polyol Sales Growth Rate by Application (2020-2025)

8 NATURAL OIL-BASED POLYOL MARKET SALES BY REGION

- 8.1 Global Natural Oil-Based Polyol Sales by Region
 - 8.1.1 Global Natural Oil-Based Polyol Sales by Region
 - 8.1.2 Global Natural Oil-Based Polyol Sales Market Share by Region
- 8.2 Global Natural Oil-Based Polyol Market Size by Region
 - 8.2.1 Global Natural Oil-Based Polyol Market Size by Region
 - 8.2.2 Global Natural Oil-Based Polyol Market Size by Region
- 8.3 North America
 - 8.3.1 North America Natural Oil-Based Polyol Sales by Country
 - 8.3.2 North America Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Sales by Country
 - 8.4.2 Europe Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Sales by Region
 - 8.5.2 Asia Pacific Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Sales by Country
 - 8.6.2 South America Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Sales by Region

8.7.2 Middle East and Africa Natural Oil-Based Polyol 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 NATURAL OIL-BASED POLYOL MARKET PRODUCTION BY REGION

9.1 Global Production of Natural Oil-Based Polyol by Region(2020-2025)

9.2 Global Natural Oil-Based Polyol Revenue Market Share by Region (2020-2025)

9.3 Global Natural Oil-Based Polyol Production, Revenue, Price and Gross Margin (2020-2025)

9.4 North America Natural Oil-Based Polyol Production

9.4.1 North America Natural Oil-Based Polyol Production Growth Rate (2020-2025)

9.4.2 North America Natural Oil-Based Polyol Production, Revenue, Price and Gross Margin (2020-2025)

9.5 Europe Natural Oil-Based Polyol Production

9.5.1 Europe Natural Oil-Based Polyol Production Growth Rate (2020-2025)

9.5.2 Europe Natural Oil-Based Polyol Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan Natural Oil-Based Polyol Production (2020-2025)

9.6.1 Japan Natural Oil-Based Polyol Production Growth Rate (2020-2025)

9.6.2 Japan Natural Oil-Based Polyol Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China Natural Oil-Based Polyol Production (2020-2025)

9.7.1 China Natural Oil-Based Polyol Production Growth Rate (2020-2025)

9.7.2 China Natural Oil-Based Polyol Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 BASF

10.1.1 BASF Basic Information

10.1.2 BASF Natural Oil-Based Polyol Product Overview

- 10.1.3 BASF Natural Oil-Based Polyol Product Market Performance
- 10.1.4 BASF Business Overview
- 10.1.5 BASF SWOT Analysis
- 10.1.6 BASF Recent Developments
- 10.2 Cargill Inc
 - 10.2.1 Cargill Inc Basic Information
 - 10.2.2 Cargill Inc Natural Oil-Based Polyol Product Overview
 - 10.2.3 Cargill Inc Natural Oil-Based Polyol Product Market Performance
 - 10.2.4 Cargill Inc Business Overview
 - 10.2.5 Cargill Inc SWOT Analysis
 - 10.2.6 Cargill Inc Recent Developments
- 10.3 MCNS
 - 10.3.1 MCNS Basic Information
 - 10.3.2 MCNS Natural Oil-Based Polyol Product Overview
 - 10.3.3 MCNS Natural Oil-Based Polyol Product Market Performance
 - 10.3.4 MCNS Business Overview
 - 10.3.5 MCNS SWOT Analysis
 - 10.3.6 MCNS Recent Developments
- 10.4 Emery Oleochemicals
 - 10.4.1 Emery Oleochemicals Basic Information
 - 10.4.2 Emery Oleochemicals Natural Oil-Based Polyol Product Overview
 - 10.4.3 Emery Oleochemicals Natural Oil-Based Polyol Product Market Performance
 - 10.4.4 Emery Oleochemicals Business Overview
 - 10.4.5 Emery Oleochemicals Recent Developments
- 10.5 Alberdingk Boley
 - 10.5.1 Alberdingk Boley Basic Information
 - 10.5.2 Alberdingk Boley Natural Oil-Based Polyol Product Overview
 - 10.5.3 Alberdingk Boley Natural Oil-Based Polyol Product Market Performance
 - 10.5.4 Alberdingk Boley Business Overview
 - 10.5.5 Alberdingk Boley Recent Developments
- 10.6 Jayant Agro-Organics Limited
 - 10.6.1 Jayant Agro-Organics Limited Basic Information
 - 10.6.2 Jayant Agro-Organics Limited Natural Oil-Based Polyol Product Overview
 - 10.6.3 Jayant Agro-Organics Limited Natural Oil-Based Polyol Product Market Performance
 - 10.6.4 Jayant Agro-Organics Limited Business Overview
 - 10.6.5 Jayant Agro-Organics Limited Recent Developments
- 10.7 Maskimi (Bina Puri)
 - 10.7.1 Maskimi (Bina Puri) Basic Information

- 10.7.2 Maskimi (Bina Puri) Natural Oil-Based Polyol Product Overview
- 10.7.3 Maskimi (Bina Puri) Natural Oil-Based Polyol Product Market Performance
- 10.7.4 Maskimi (Bina Puri) Business Overview
- 10.7.5 Maskimi (Bina Puri) Recent Developments
- 10.8 Hairma
 - 10.8.1 Hairma Basic Information
 - 10.8.2 Hairma Natural Oil-Based Polyol Product Overview
 - 10.8.3 Hairma Natural Oil-Based Polyol Product Market Performance
 - 10.8.4 Hairma Business Overview
 - 10.8.5 Hairma Recent Developments
- 10.9 Stahl
 - 10.9.1 Stahl Basic Information
 - 10.9.2 Stahl Natural Oil-Based Polyol Product Overview
 - 10.9.3 Stahl Natural Oil-Based Polyol Product Market Performance
 - 10.9.4 Stahl Business Overview
 - 10.9.5 Stahl Recent Developments
- 10.10 Polylabs
 - 10.10.1 Polylabs Basic Information
 - 10.10.2 Polylabs Natural Oil-Based Polyol Product Overview
 - 10.10.3 Polylabs Natural Oil-Based Polyol Product Market Performance
 - 10.10.4 Polylabs Business Overview
 - 10.10.5 Polylabs Recent Developments
- 10.11 Xuchuan Chemical
 - 10.11.1 Xuchuan Chemical Basic Information
 - 10.11.2 Xuchuan Chemical Natural Oil-Based Polyol Product Overview
 - 10.11.3 Xuchuan Chemical Natural Oil-Based Polyol Product Market Performance
 - 10.11.4 Xuchuan Chemical Business Overview
 - 10.11.5 Xuchuan Chemical Recent Developments
- 10.12 Aurorium
 - 10.12.1 Aurorium Basic Information
 - 10.12.2 Aurorium Natural Oil-Based Polyol Product Overview
 - 10.12.3 Aurorium Natural Oil-Based Polyol Product Market Performance
 - 10.12.4 Aurorium Business Overview
 - 10.12.5 Aurorium Recent Developments
- 10.13 NivaPol
 - 10.13.1 NivaPol Basic Information
 - 10.13.2 NivaPol Natural Oil-Based Polyol Product Overview
 - 10.13.3 NivaPol Natural Oil-Based Polyol Product Market Performance
 - 10.13.4 NivaPol Business Overview

- 10.13.5 NivaPol Recent Developments
- 10.14 MCPU Polymer
 - 10.14.1 MCPU Polymer Basic Information
 - 10.14.2 MCPU Polymer Natural Oil-Based Polyol Product Overview
 - 10.14.3 MCPU Polymer Natural Oil-Based Polyol Product Market Performance
 - 10.14.4 MCPU Polymer Business Overview
 - 10.14.5 MCPU Polymer Recent Developments
- 10.15 EDB Poliois Vegetais
 - 10.15.1 EDB Poliois Vegetais Basic Information
 - 10.15.2 EDB Poliois Vegetais Natural Oil-Based Polyol Product Overview
 - 10.15.3 EDB Poliois Vegetais Natural Oil-Based Polyol Product Market Performance
 - 10.15.4 EDB Poliois Vegetais Business Overview
 - 10.15.5 EDB Poliois Vegetais Recent Developments

11 NATURAL OIL-BASED POLYOL MARKET FORECAST BY REGION

- 11.1 Global Natural Oil-Based Polyol Market Size Forecast
- 11.2 Global Natural Oil-Based Polyol Market Forecast by Region
 - 11.2.1 North America Market Size Forecast by Country
 - 11.2.2 Europe Natural Oil-Based Polyol Market Size Forecast by Country
 - 11.2.3 Asia Pacific Natural Oil-Based Polyol Market Size Forecast by Region
 - 11.2.4 South America Natural Oil-Based Polyol Market Size Forecast by Country
 - 11.2.5 Middle East and Africa Forecasted Sales of Natural Oil-Based Polyol by Country

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

- 12.1 Global Natural Oil-Based Polyol Market Forecast by Type (2026-2035)
 - 12.1.1 Global Forecasted Sales of Natural Oil-Based Polyol by Type (2026-2035)
 - 12.1.2 Global Natural Oil-Based Polyol Market Size Forecast by Type (2026-2035)
 - 12.1.3 Global Forecasted Price of Natural Oil-Based Polyol by Type (2026-2035)
- 12.2 Global Natural Oil-Based Polyol Market Forecast by Application (2026-2035)
 - 12.2.1 Global Natural Oil-Based Polyol Sales (K MT) Forecast by Application
 - 12.2.2 Global Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Market Size by Type (M USD)
Table 4. Global Natural Oil-Based Polyol Market Size by Application
Table 5. Natural Oil-Based Polyol Market Size Comparison by Region (M USD)
Table 6. Global Natural Oil-Based Polyol Sales (K MT) by Manufacturers (2020-2025)
Table 7. Global Natural Oil-Based Polyol Sales Market Share by Manufacturers (2020-2025)
Table 8. Global Natural Oil-Based Polyol Revenue (M USD) by Manufacturers (2020-2025)
Table 9. Global Natural Oil-Based Polyol Revenue Share by Manufacturers (2020-2025)
Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Natural Oil-Based Polyol as of 2025)
Table 11. Global Market Natural Oil-Based Polyol Average Price (USD/KG) of Key Manufacturers (2020-2025)
Table 12. Manufacturers? Manufacturing Sites, Areas Served
Table 13. Manufacturers? Product Type
Table 14. Global Natural Oil-Based Polyol 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. Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Sales by Type (K MT)
Table 27. Global Natural Oil-Based Polyol Market Size by Type (M USD)
Table 28. Global Natural Oil-Based Polyol Sales (K MT) by Type (2020-2025)
Table 29. Global Natural Oil-Based Polyol Sales Market Share by Type (2020-2025)

Table 30. Global Natural Oil-Based Polyol Market Size (M USD) by Type (2020-2025)
Table 31. Global Natural Oil-Based Polyol Market Share by Type (2020-2025)
Table 32. Global Natural Oil-Based Polyol Price (USD/KG) by Type (2020-2025)
Table 33. Global Natural Oil-Based Polyol Sales (K MT) by Application
Table 34. Global Natural Oil-Based Polyol Market Size by Application
Table 35. Global Natural Oil-Based Polyol Sales by Application (2020-2025) & (K MT)
Table 36. Global Natural Oil-Based Polyol Sales Market Share by Application (2020-2025)
Table 37. Global Natural Oil-Based Polyol Market Size by Application (2020-2025) & (M USD)
Table 38. Global Natural Oil-Based Polyol Market Share by Application (2020-2025)
Table 39. Global Natural Oil-Based Polyol Sales Growth Rate by Application (2020-2025)
Table 40. Global Natural Oil-Based Polyol Sales by Region (2020-2025) & (K MT)
Table 41. Global Natural Oil-Based Polyol Sales Market Share by Region (2020-2025)
Table 42. Global Natural Oil-Based Polyol Market Size by Region (2020-2025) & (M USD)
Table 43. Global Natural Oil-Based Polyol Market Size by Region (2020-2025)
Table 44. North America Natural Oil-Based Polyol Sales by Country (2020-2025) & (K MT)
Table 45. North America Natural Oil-Based Polyol Market Size by Country (2020-2025) & (M USD)
Table 46. Europe Natural Oil-Based Polyol Sales by Country (2020-2025) & (K MT)
Table 47. Europe Natural Oil-Based Polyol Market Size by Country (2020-2025) & (M USD)
Table 48. Asia Pacific Natural Oil-Based Polyol Sales by Region (2020-2025) & (K MT)
Table 49. Asia Pacific Natural Oil-Based Polyol Market Size by Region (2020-2025) & (M USD)
Table 50. South America Natural Oil-Based Polyol Sales by Country (2020-2025) & (K MT)
Table 51. South America Natural Oil-Based Polyol Market Size by Country (2020-2025) & (M USD)
Table 52. Middle East and Africa Natural Oil-Based Polyol Sales by Region (2020-2025) & (K MT)
Table 53. Middle East and Africa Natural Oil-Based Polyol Market Size by Region (2020-2025) & (M USD)
Table 54. Global Natural Oil-Based Polyol Production (K MT) by Region(2020-2025)
Table 55. Global Natural Oil-Based Polyol Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Natural Oil-Based Polyol Revenue Market Share by Region (2020-2025)

Table 57. Global Natural Oil-Based Polyol Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 58. North America Natural Oil-Based Polyol Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 59. Europe Natural Oil-Based Polyol Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 60. Japan Natural Oil-Based Polyol Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 61. China Natural Oil-Based Polyol Production (K MT), Revenue (US\$ Million), Price (USD/KG) and Gross Margin (2020-2025)

Table 62. BASF Basic Information

Table 63. BASF Natural Oil-Based Polyol Product Overview

Table 64. BASF Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 65. BASF Business Overview

Table 66. BASF SWOT Analysis

Table 67. BASF Recent Developments

Table 68. Cargill Inc Basic Information

Table 69. Cargill Inc Natural Oil-Based Polyol Product Overview

Table 70. Cargill Inc Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 71. Cargill Inc Business Overview

Table 72. Cargill Inc SWOT Analysis

Table 73. Cargill Inc Recent Developments

Table 74. MCNS Basic Information

Table 75. MCNS Natural Oil-Based Polyol Product Overview

Table 76. MCNS Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 77. MCNS Business Overview

Table 78. MCNS SWOT Analysis

Table 79. MCNS Recent Developments

Table 80. Emery Oleochemicals Basic Information

Table 81. Emery Oleochemicals Natural Oil-Based Polyol Product Overview

Table 82. Emery Oleochemicals Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 83. Emery Oleochemicals Business Overview

Table 84. Emery Oleochemicals Recent Developments

Table 85. Alberdingk Boley Basic Information
Table 86. Alberdingk Boley Natural Oil-Based Polyol Product Overview
Table 87. Alberdingk Boley Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
Table 88. Alberdingk Boley Business Overview
Table 89. Alberdingk Boley Recent Developments
Table 90. Jayant Agro-Organics Limited Basic Information
Table 91. Jayant Agro-Organics Limited Natural Oil-Based Polyol Product Overview
Table 92. Jayant Agro-Organics Limited Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
Table 93. Jayant Agro-Organics Limited Business Overview
Table 94. Jayant Agro-Organics Limited Recent Developments
Table 95. Maskimi (Bina Puri) Basic Information
Table 96. Maskimi (Bina Puri) Natural Oil-Based Polyol Product Overview
Table 97. Maskimi (Bina Puri) Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
Table 98. Maskimi (Bina Puri) Business Overview
Table 99. Maskimi (Bina Puri) Recent Developments
Table 100. Hairma Basic Information
Table 101. Hairma Natural Oil-Based Polyol Product Overview
Table 102. Hairma Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
Table 103. Hairma Business Overview
Table 104. Hairma Recent Developments
Table 105. Stahl Basic Information
Table 106. Stahl Natural Oil-Based Polyol Product Overview
Table 107. Stahl Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
Table 108. Stahl Business Overview
Table 109. Stahl Recent Developments
Table 110. Polylabs Basic Information
Table 111. Polylabs Natural Oil-Based Polyol Product Overview
Table 112. Polylabs Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)
Table 113. Polylabs Business Overview
Table 114. Polylabs Recent Developments
Table 115. Xuchuan Chemical Basic Information
Table 116. Xuchuan Chemical Natural Oil-Based Polyol Product Overview
Table 117. Xuchuan Chemical Natural Oil-Based Polyol Sales (K MT), Revenue (M

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

Table 118. Xuchuan Chemical Business Overview

Table 119. Xuchuan Chemical Recent Developments

Table 120. Aurorium Basic Information

Table 121. Aurorium Natural Oil-Based Polyol Product Overview

Table 122. Aurorium Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 123. Aurorium Business Overview

Table 124. Aurorium Recent Developments

Table 125. NivaPol Basic Information

Table 126. NivaPol Natural Oil-Based Polyol Product Overview

Table 127. NivaPol Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 128. NivaPol Business Overview

Table 129. NivaPol Recent Developments

Table 130. MCPU Polymer Basic Information

Table 131. MCPU Polymer Natural Oil-Based Polyol Product Overview

Table 132. MCPU Polymer Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 133. MCPU Polymer Business Overview

Table 134. MCPU Polymer Recent Developments

Table 135. EDB Poliois Vegetais Basic Information

Table 136. EDB Poliois Vegetais Natural Oil-Based Polyol Product Overview

Table 137. EDB Poliois Vegetais Natural Oil-Based Polyol Sales (K MT), Revenue (M USD), Price (USD/KG) and Gross Margin (2020-2025)

Table 138. EDB Poliois Vegetais Business Overview

Table 139. EDB Poliois Vegetais Recent Developments

Table 140. Global Natural Oil-Based Polyol Sales Forecast by Region (2026-2035) & (K MT)

Table 141. Global Natural Oil-Based Polyol Market Size Forecast by Region (2026-2035) & (M USD)

Table 142. North America Natural Oil-Based Polyol Sales Forecast by Country (2026-2035) & (K MT)

Table 143. North America Natural Oil-Based Polyol Market Size Forecast by Country (2026-2035) & (M USD)

Table 144. Europe Natural Oil-Based Polyol Sales Forecast by Country (2026-2035) & (K MT)

Table 145. Europe Natural Oil-Based Polyol Market Size Forecast by Country (2026-2035) & (M USD)

Table 146. Asia Pacific Natural Oil-Based Polyol Sales Forecast by Region (2026-2035) & (K MT)

Table 147. Asia Pacific Natural Oil-Based Polyol Market Size Forecast by Region (2026-2035) & (M USD)

Table 148. South America Natural Oil-Based Polyol Sales Forecast by Country (2026-2035) & (K MT)

Table 149. South America Natural Oil-Based Polyol Market Size Forecast by Country (2026-2035) & (M USD)

Table 150. Middle East and Africa Natural Oil-Based Polyol Sales Forecast by Country (2026-2035) & (Units)

Table 151. Middle East and Africa Natural Oil-Based Polyol Market Size Forecast by Country (2026-2035) & (M USD)

Table 152. Global Natural Oil-Based Polyol Sales Forecast by Type (2026-2035) & (K MT)

Table 153. Global Natural Oil-Based Polyol Market Size Forecast by Type (2026-2035) & (M USD)

Table 154. Global Natural Oil-Based Polyol Price Forecast by Type (2026-2035) & (USD/KG)

Table 155. Global Natural Oil-Based Polyol Sales (K MT) Forecast by Application (2026-2035)

Table 156. Global Natural Oil-Based Polyol Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Natural Oil-Based Polyol
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Natural Oil-Based Polyol Market Size (M USD), 2025-2035
- Figure 5. Global Natural Oil-Based Polyol Market Size (M USD) (2020-2035)
- Figure 6. Global Natural Oil-Based Polyol 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. Natural Oil-Based Polyol Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Natural Oil-Based Polyol Product Life Cycle
- Figure 13. Natural Oil-Based Polyol Sales Share by Manufacturers in 2025
- Figure 14. Global Natural Oil-Based Polyol Revenue Share by Manufacturers in 2025
- Figure 15. Natural Oil-Based Polyol Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Natural Oil-Based Polyol Average Price (USD/KG) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Natural Oil-Based Polyol Revenue in 2025
- Figure 18. Industry Chain Map of Natural Oil-Based Polyol
- Figure 19. Global Natural Oil-Based Polyol Market PEST Analysis
- Figure 20. Global Natural Oil-Based Polyol 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 Natural Oil-Based Polyol Market Share by Type
- Figure 27. Sales Market Share of Natural Oil-Based Polyol by Type (2020-2025)
- Figure 28. Sales Market Share of Natural Oil-Based Polyol by Type in 2025
- Figure 29. Market Share of Natural Oil-Based Polyol by Type (2020-2025)
- Figure 30. Market Share of Natural Oil-Based Polyol by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 32. Global Natural Oil-Based Polyol Market Share by Application

Figure 33. Global Natural Oil-Based Polyol Sales Market Share by Application (2020-2025)

Figure 34. Global Natural Oil-Based Polyol Sales Market Share by Application in 2025

Figure 35. Global Natural Oil-Based Polyol Market Share by Application (2020-2025)

Figure 36. Global Natural Oil-Based Polyol Market Share by Application in 2025

Figure 37. Global Natural Oil-Based Polyol Sales Growth Rate by Application (2020-2025)

Figure 38. Global Natural Oil-Based Polyol Sales Market Share by Region (2020-2025)

Figure 39. Global Natural Oil-Based Polyol Market Size by Region (2020-2025)

Figure 40. North America Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 41. North America Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 42. North America Natural Oil-Based Polyol Sales Market Share by Country in 2024

Figure 43. North America Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Natural Oil-Based Polyol Market Size by Country in 2024

Figure 45. U.S. Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 46. U.S. Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Natural Oil-Based Polyol Sales (K MT) and Growth Rate (2020-2025)

Figure 48. Canada Natural Oil-Based Polyol Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Natural Oil-Based Polyol Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Natural Oil-Based Polyol Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 52. Europe Natural Oil-Based Polyol Sales Market Share by Country in 2024

Figure 53. Europe Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Natural Oil-Based Polyol Market Size by Country in 2024

Figure 55. Germany Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 56. Germany Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K

MT)

Figure 58. France Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 60. U.K. Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 62. Italy Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 64. Spain Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Natural Oil-Based Polyol Sales and Growth Rate (K MT)

Figure 66. Asia Pacific Natural Oil-Based Polyol Sales Market Share by Region in 2024

Figure 67. Asia Pacific Natural Oil-Based Polyol Market Size by Region in 2024

Figure 68. China Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 69. China Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 71. Japan Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 73. South Korea Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 75. India Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 77. Southeast Asia Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Natural Oil-Based Polyol Sales and Growth Rate (K MT)

Figure 79. South America Natural Oil-Based Polyol Sales Market Share by Country in 2024

Figure 80. South America Natural Oil-Based Polyol Market Size and Growth Rate (M

USD)

Figure 81. South America Natural Oil-Based Polyol Market Size by Country in 2024

Figure 82. Brazil Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 83. Brazil Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 85. Argentina Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 87. Columbia Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Natural Oil-Based Polyol Sales and Growth Rate (K MT)

Figure 89. Middle East and Africa Natural Oil-Based Polyol Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Natural Oil-Based Polyol Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Natural Oil-Based Polyol Market Size by Region in 2024

Figure 92. Saudi Arabia Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 93. Saudi Arabia Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 94. UAE Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 95. UAE Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 97. Egypt Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 99. Nigeria Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Natural Oil-Based Polyol Sales and Growth Rate (2020-2025) & (K MT)

Figure 101. South Africa Natural Oil-Based Polyol Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Natural Oil-Based Polyol Production Market Share by Region (2020-2025)

Figure 103. North America Natural Oil-Based Polyol Production (K MT) Growth Rate (2020-2025)

Figure 104. Europe Natural Oil-Based Polyol Production (K MT) Growth Rate (2020-2025)

Figure 105. Japan Natural Oil-Based Polyol Production (K MT) Growth Rate (2020-2025)

Figure 106. China Natural Oil-Based Polyol Production (K MT) Growth Rate (2020-2025)

Figure 107. Global Natural Oil-Based Polyol Sales Forecast by Volume (2020-2035) & (K MT)

Figure 108. Global Natural Oil-Based Polyol Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Natural Oil-Based Polyol Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Natural Oil-Based Polyol Market Share Forecast by Type (2026-2035)

Figure 111. Global Natural Oil-Based Polyol Sales Forecast by Application (2026-2035)

Figure 112. Global Natural Oil-Based Polyol Market Share Forecast by Application (2026-2035)

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