

Global Crude Tall Oil Derivative Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Crude Tall Oil Derivative market size was valued at US\$ 3272 million in 2025 and is forecast to a readjusted size of US\$ 4916 million by 2032 with a CAGR of 6.1% during review period.

Crude Tall Oil (CTO) is a by-product of the kraft pulping process used by many paper mills. Tall oil soap is collected at the mills and then acidulated to make crude tall oil. It is a mixture of fatty acids, rosin and Rubber neutral materials and forms water-in-oil emulsions and stabilizes mud systems at high bottom-hole temperatures. The CTO can then be further refined through the fractionation process to separate it into the components of tall oil fatty acid, tall oil rosin, distilled tall oil, pitch and heads. In 2024, global Crude Tall Oil Derivative production reached approximately 2442 K MT, with an average global market price of around US\$ 1012 per MT.

The crude tall oil (CTO) derivatives market is a moderately sized, steadily growing segment of the bio-based chemicals industry, sitting at the intersection of pulp & paper by-products and green specialty chemicals. CTO derivatives are used in adhesives, inks, lubricants, fuel additives, asphalt emulsifiers, surfactants, metalworking fluids, rubber processing, and various industrial and construction chemicals, as well as in some personal-care and home-care formulations. Growth is driven by the push toward renewable, low-carbon inputs, the desire to reduce reliance on petroleum-based resins and surfactants, and the availability of CTO streams from large kraft pulp mills, with Europe and North America as major producers and a growing customer base in Asia and other regions.

Along the industry chain, CTO is recovered from tall oil soap skimmings at kraft pulp

mills, then acidulated to produce crude tall oil, which is sold to CTO refiners. These midstream refiners distill CTO into fractions such as tall oil fatty acids (TOFA), tall oil rosin (TOR), distilled tall oil (DTO) and heads/tails cuts, which are then further upgraded (esterification, hydrogenation, maleination, etc.) into tailored derivatives for coatings, adhesives, emulsifiers and fuel/lube additives. Downstream, chemical formulators, road construction firms, lubricant blenders, personal-care and household product manufacturers incorporate these derivatives into finished products that leverage their performance and bio-based positioning. Key demand drivers include sustainability mandates, circular/bioeconomy strategies, and performance advantages in certain applications, while constraints include dependence on pulp & paper capacity, quality variability of CTO feedstock and competition from both petrochemical and other bio-based alternatives; overall, CTO derivative producers typically achieve moderate gross profit margins, most commonly in the range of about 18-30%.

This report is a detailed and comprehensive analysis for global Crude Tall Oil Derivative market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Crude Tall Oil Derivative market size and forecasts, in consumption value (\$ Million), sales quantity (Kiloton), and average selling prices (US\$/Ton), 2021-2032

Global Crude Tall Oil Derivative market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kiloton), and average selling prices (US\$/Ton), 2021-2032

Global Crude Tall Oil Derivative market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kiloton), and average selling prices (US\$/Ton), 2021-2032

Global Crude Tall Oil Derivative market shares of main players, shipments in revenue (\$ Million), sales quantity (Kiloton), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Crude Tall Oil Derivative

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Crude Tall Oil Derivative market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Kraton, Westrock, Forchem, Georgia-Pacific, Eastman, Harima, OOO Torgoviy Dom Lesokhimik, Lascaray, Segezha Group, IOP, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Crude Tall Oil Derivative market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Tall Oil Rosin (TOR)

Tall Oil Pitch (TOP)

Distilled Tall Oil (DTO)

Tall Oil Fatty Acids (TOFA)

Market segment by Feature

Vacuum Refining

Atmospheric Pressure Refining

Market segment by Channel

Direct Selling

Distribution

Market segment by Application

Fuel and Fuel Additives

Surfactant

Mining and Oilfield Chemicals

Coating and Inks

Rubber

Others

Major players covered

Kraton

Westrock

Forchem

Georgia-Pacific

Eastman

Harima

OOO Torgoviy Dom Lesokhimik

Lascaray

Segezha Group

IOP

DRT

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Crude Tall Oil Derivative product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Crude Tall Oil Derivative, with price, sales quantity, revenue, and global market share of Crude Tall Oil Derivative from 2021 to 2026.

Chapter 3, the Crude Tall Oil Derivative competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Crude Tall Oil Derivative breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Crude Tall Oil Derivative market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Crude Tall Oil Derivative.

Chapter 14 and 15, to describe Crude Tall Oil Derivative sales channel, distributors, customers, research findings and conclusion.

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