

Global Epoxidized Soybean Oil Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Epoxidized Soybean Oil market size is expected to reach \$ 1116 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

Epoxidized Soybean Oil (often abbreviated as ESBO or ESO) is a bio-based plasticizer and stabilizer derived from soybean oil through a chemical process called epoxidation, in which the carbon-carbon double bonds of unsaturated fatty acids in soybean oil are converted into epoxy groups (oxirane rings).

In 2024, global Epoxidized Soybean Oil sales reached approximately 562.9 K Tons, with an average global market price of around US\$ 1,281 per ton.

The ESBO market is set for steady growth, tracking the expansion of flexible PVC demand and global phthalate substitution trends. While feedstock volatility (soybean oil, hydrogen peroxide) remains a challenge, sustainability, regulatory compliance, and end-user safety requirements will continue to strengthen ESBO's position in the plasticizer and stabilizer market. Producers that control upstream integration, ensure consistent quality (high oxirane oxygen, light color), and secure regulatory approvals are best positioned to capture growth.

Market Drivers

Phthalate restrictions & consumer safety concerns: Regulations (e.g., EU REACH, U.S. Prop 65, OEM substance restrictions) accelerate the adoption of ESBO as a phthalate-free stabilizer/plasticizer. Food packaging regulations: ESBO's approval in limited migration levels allows it to serve as a plasticizer in PVC closures for food and beverage packaging.

Market Trends

Shift toward bio-based plasticizers: Growing replacement of phthalates (DEHP, DBP, DOP) with safer, renewable alternatives such as ESBO. ESBO positioned as both eco-friendly and cost-competitive compared to specialty non-phthalates. Rising demand in flexible PVC applications: Wire & cable, films, synthetic leather, flooring, and packaging continue to dominate ESBO consumption. Stable demand from food-contact PVC liners and gaskets, subject to regional migration regulations.

Upstream and Downstream Market

Soybeans ? Soybean Oil: The main feedstock. Global supply is concentrated in the U.S., Brazil, Argentina, and China. Agricultural yields, weather patterns, and competing uses (edible oil, biodiesel/renewable diesel) strongly influence availability and price. Hydrogen Peroxide (H₂O₂): The oxidant for the epoxidation process, supplied by global chemical producers (e.g., Solvay, Evonik, Nouryon). Organic Acids (Acetic/Formic): Needed to form peracids for epoxidation; produced by large acetyl chain chemical companies (e.g., Celanese, BASF, INEOS).

PVC compounding (wire & cable, film, hose, profiles, medical/food-contact grades) ESBO is widely used as a secondary plasticizer and heat stabilizer in flexible PVC compounding. Examples: Teknor Apex, Orbia/Alphagary, Benvic, etc.

This report studies the global Epoxidized Soybean Oil production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Epoxidized Soybean Oil and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Epoxidized Soybean Oil that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Epoxidized Soybean Oil total production and demand, 2021-2032, (K Tons)

Global Epoxidized Soybean Oil total production value, 2021-2032, (USD Million)

Global Epoxidized Soybean Oil production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Tons), (based on production site)

Global Epoxidized Soybean Oil consumption by region & country, CAGR, 2021-2032 &

(K Tons)

U.S. VS China: Epoxidized Soybean Oil domestic production, consumption, key domestic manufacturers and share

Global Epoxidized Soybean Oil production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Tons)

Global Epoxidized Soybean Oil production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

Global Epoxidized Soybean Oil production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Tons)

This report profiles key players in the global Epoxidized Soybean Oil market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Hairma Chemicals, Cargill, CHS, BASF, ADEKA, Zhejiang Jiaao, Dongguan Lingchuang, Xinjinlong Chemical Additives, Nan Ya Plastics, Valtris Specialty Chemicals, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Epoxidized Soybean Oil market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Epoxidized Soybean Oil Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Epoxidized Soybean Oil Market, Segmentation by Type:

Industrial Grade

Food Grade

Global Epoxidized Soybean Oil Market, Segmentation by Classification:

PVC Plasticizer and Stabilizer

Coatings and Paints

Others

Global Epoxidized Soybean Oil Market, Segmentation by Application:

Packaging

Industrial

Automotive

Building Materials

Medical

Others

Companies Profiled:

Hairma Chemicals

Cargill

CHS

BASF

ADEKA

Zhejiang Jiaao

Dongguan Lingchuang

Xinjinlong Chemical Additives

Nan Ya Plastics

Valtris Specialty Chemicals

Chang Chun Group

Baolilai Plastic Additives

Galata Chemicals

Longda Oil Technology

Qingzhou Huadong

Shenzhen Kaiqi Chemicals

Key Questions Answered:

1. How big is the global Epoxidized Soybean Oil market?
2. What is the demand of the global Epoxidized Soybean Oil market?
3. What is the year over year growth of the global Epoxidized Soybean Oil market?
4. What is the production and production value of the global Epoxidized Soybean Oil market?
5. Who are the key producers in the global Epoxidized Soybean Oil market?
6. What are the growth factors driving the market demand?

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