

Global Pelargonic Acid and Azelaic Acid Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pelargonic Acid and Azelaic Acid market size is expected to reach \$ 336 million by 2032, rising at a market growth of 4.5% CAGR during the forecast period (2026-2032).

Pelargonic Acid, also called nonanoic acid, is a monocarboxylic acid that naturally occurring fatty acid found in plants and animals. The U.S. Food and Drug Administration (FDA) has approved pelargonic acid for use in food, cosmetics, shampoos and other personal care products, and in transdermal drug delivery systems. Other applications are as a developer for photographic plates, in lacquers and plastics, in lubricants and metalworking fluids, and in herbicide products for plant protection. Pelargonic acid is a clear, light colored, monobasic acid which is liquid at room temperature. Pelargonic acid derives unique performance characteristics from its oddcarbon chain length, providing definite advantages in many quality and performancesensitive applications over short-chain fatty acids obtained from imported coconut oil. The nine-carbon structure differs from the even-carbon chains of coconut fatty acids, imparting pelargonic acid and its derivatives with significantly different solubility characteristics, lower-temperature fluidity, and low melting points.

Azelaic acid is a crystalline, opaque-white solid, soluble in hot water, alcohols, diethyl ether, and other polar solvents. The two carboxyl groups of azelaic acid limit its solubility in nonpolar solvents such as naphtha or carbon tetrachloride. It is a 9-carbon, straight chain, saturated, dibasic acid mainly produced commercially by the ozone oxidation of oleic acid. It is chemical raw material used in the production of plastics, lubricants, electronics, pharmaceuticals & cosmetics, etc.

Market Drivers

1. Agriculture: The Top Choice in the Global 'Green' Wave

Agriculture is currently the largest application area for nonanoic acid. Its core driving force is its status as a highly efficient and environmentally friendly bio-based herbicide, perfectly aligning with the global trend of sustainable agricultural development.

Filling the Glyphosate Gap: Glyphosate is strictly restricted or banned in many regions, including the EU, due to its potential carcinogenic risks. Nonanoic acid, as a direct alternative contact herbicide, has rapidly filled this market gap. Each new ban triggers a significant increase in demand.

Combating Herbicide-Resistant Weeds: More than 263 weed species in over 70 countries worldwide have developed resistance to traditional chemical herbicides. Nonanoic acid, through its physical mechanism of disrupting plant cell membranes, remains effective against existing resistant weeds, making it a key tool in resistance management.

Adapting to the expansion of organic agriculture: Global organic farmland has expanded to nearly 96.4 million hectares, and organic food retail sales are approaching \$135 billion, creating a huge market demand for compliant biopesticides like nonanoic acid.

Continuous technological innovation: New generation nonanoic acid ester derivatives effectively improve the shortcomings of nonanoic acid, which is easily washed away by rain. Their stronger leaf adhesion and rain resistance (rain resistance) allow them to maintain stable weed control effects even in areas with high rainfall.

2. Industrial applications: The 'green' cornerstone of high-end manufacturing.

In the industrial sector, nonanoic acid is driving a green revolution as a key bio-based intermediate in products such as high-performance lubricants, plasticizers, and coatings.

High-performance lubricants and metalworking fluids: Polyol esters synthesized from nonanoic acid possess excellent thermal stability and viscosity characteristics, making them key components of high-end lubricants such as aircraft engine oils. For example, Emery Oleochemicals has launched nonanoic acid products specifically designed for metalworking fluids and lubricants (such as EMERY® 1202).

Environmentally friendly plasticizers: Traditional phthalate plasticizers are being phased

out due to health risks. Nonanoic acid can be used to produce environmentally friendly non-phthalate plasticizers to replace traditional products.

This report studies the global Pelargonic Acid and Azelaic Acid production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pelargonic Acid and Azelaic Acid 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 Pelargonic Acid and Azelaic Acid that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pelargonic Acid and Azelaic Acid total production and demand, 2021-2032, (Tons)

Global Pelargonic Acid and Azelaic Acid total production value, 2021-2032, (USD Million)

Global Pelargonic Acid and Azelaic Acid production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Pelargonic Acid and Azelaic Acid consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Pelargonic Acid and Azelaic Acid domestic production, consumption, key domestic manufacturers and share

Global Pelargonic Acid and Azelaic Acid production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Pelargonic Acid and Azelaic Acid production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Pelargonic Acid and Azelaic Acid production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Pelargonic Acid and Azelaic Acid 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 Emery Oleochemicals, Novamont (Matrica SpA), BASF, Oxea (formerly OQ Chemicals), Croda Sipo, Jiangsu Senxuan, Nantong Hengxing, Hunan Beiya Biotech, Zhengzhou Yibang, Cargill, 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 Pelargonic Acid and Azelaic Acid market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/kg) 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 Pelargonic Acid and Azelaic Acid Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pelargonic Acid and Azelaic Acid Market, Segmentation by Type:

Pelargonic Acid

Azelaic Acid

Global Pelargonic Acid and Azelaic Acid Market, Segmentation by Content:

Content 90%-98%

Content 99%

Other (below 90%)

Global Pelargonic Acid and Azelaic Acid Market, Segmentation by Marketing Method:

Direct Sales

Distribution

Global Pelargonic Acid and Azelaic Acid Market, Segmentation by Application:

Plastics

Lubricants

Plant Protection Products

Pharmaceuticals and Cosmetics

Others

Companies Profiled:

Emery Oleochemicals

Novamont (Matrica SpA)

BASF

Oxea (formerly OQ Chemicals)

Croda Sipo

Jiangsu Senxuan

Nantong Hengxing

Hunan Beiya Biotech

Zhengzhou Yibang

Cargill

Zhejiang Boadge

Key Questions Answered:

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

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