

Global Wood Pyrolysis Oil Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GAE45501D1AEEN.html>

Date: August 2026

Pages: 110

Price: US\$ 4,480.00 (Single User License)

ID: GAE45501D1AEEN

Abstracts

The global Wood Pyrolysis Oil market size is expected to reach \$ 170 million by 2032, rising at a market growth of 11.7% CAGR during the forecast period (2026-2032).

Wood Pyrolysis Oil refers to a dark brown to black liquid fuel and chemical intermediate produced by condensing volatile products generated from fast pyrolysis, catalytic pyrolysis, or related thermochemical conversion of wood, wood chips, sawdust, bark, forestry residues, and other woody biomass under oxygen-free or low-oxygen conditions. It is typically a fluid liquid with relatively high oxygen content, high moisture content, and strong acidity. Its main constituents include water, carboxylic acids, aldehydes, ketones, phenolics, furans, sugar-derived compounds, lignin-derived compounds, and small amounts of aromatic compounds. Wood Pyrolysis Oil is different from Wood Tar and Coal Tar, with its product scope focused on liquid products from fast pyrolysis of woody biomass, also commonly referred to as Fast Pyrolysis Bio-oil or Wood-based Bio-oil.

Wood Pyrolysis Oil is mainly produced in countries and regions with strong forest resources, sawmill by-product availability, and supportive biomass energy policies, including Finland, Sweden, the Netherlands, Canada, the United States, Brazil, and China. The product can be directly used in industrial boilers, district heating, and industrial steam systems as a substitute for heavy or light fuel oil. It can also serve as an intermediate feedstock for refinery co-processing, bio-based fuels, bio-based aromatic chemicals, resin raw materials, asphalt modifiers, and carbon material precursors. With rising demand for low-carbon fuels, industrial heat decarbonization, and higher-value utilization of woody biomass, Wood Pyrolysis Oil is expanding from a regional fuel substitute toward an upgradeable fuel and bio-based chemical feedstock.

In 2025, global commercial production of Wood Pyrolysis Oil reached approximately 130,000 to 150,000 tons, mainly supplied by woody biomass fast pyrolysis plants, sawmill residue-based pyrolysis projects, and forest residue utilization projects. The average FOB price of fuel-grade Wood Pyrolysis Oil was approximately USD 520 to USD 580 per ton, while products used for refinery co-processing, specialty chemical development, or small-volume high-specification applications were generally priced above fuel-grade products.

The global Wood Pyrolysis Oil market is moving from commercial validation toward broader scale-up. Compared with traditional solid biomass fuels, Wood Pyrolysis Oil offers a liquid form, easier storage and transportation, higher energy density than wood chips, and the ability to replace fossil fuel oil in boilers and industrial steam systems. These characteristics support its application potential in industrial heating, district heating, food and chemical process heat, refinery co-processing, and bio-based fuel development. Europe and North America currently have the strongest commercial foundation, supported by forest resources, sawmill residues, low-carbon fuel policies, and established heating infrastructure. As industrial sectors accelerate decarbonization, Wood Pyrolysis Oil is expected to capture additional opportunities as a renewable liquid energy carrier for heat substitution, low-carbon refinery feedstocks, and bio-based chemical applications.

However, wider adoption of Wood Pyrolysis Oil still faces technical, cost, and end-use compatibility challenges. The product has high oxygen content, high moisture content, strong acidity, and higher requirements for storage stability, corrosion control, combustion system adaptation, and downstream upgrading compared with conventional fuel oil. Feedstock collection radius, woody residue pricing, plant utilization rate, and policy support also have a significant impact on project economics. In the near term, market growth will mainly depend on stable operation of commercial plants, substitution demand from industrial heating customers, and expansion of refinery co-processing trials. Over the medium to long term, as fast pyrolysis, catalytic upgrading, hydrodeoxygenation, and bio-oil fractionation technologies mature, Wood Pyrolysis Oil is expected to expand from a low-carbon fuel into sustainable aviation fuel intermediates, low-carbon marine fuels, bio-based aromatic chemicals, and functional material precursors, upgrading the value chain from energy substitution to higher-value biorefining.

This report studies the global Wood Pyrolysis Oil production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Wood Pyrolysis 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 Wood Pyrolysis Oil that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Wood Pyrolysis Oil total production and demand, 2021-2032, (Tons)
Global Wood Pyrolysis Oil total production value, 2021-2032, (USD Million)
Global Wood Pyrolysis Oil production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)
Global Wood Pyrolysis Oil consumption by region & country, CAGR, 2021-2032 & (Tons)
U.S. VS China: Wood Pyrolysis Oil domestic production, consumption, key domestic manufacturers and share
Global Wood Pyrolysis Oil production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)
Global Wood Pyrolysis Oil production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)
Global Wood Pyrolysis Oil production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Wood Pyrolysis 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 Twence Holding B.V., Pyrocell AB, Bio?nergie AE C?te-Nord Canada Inc., Kerry Group plc, Ensyn Corporation, Suzano S.A., ONYM Group, Charm Industrial, Inc., 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 Wood Pyrolysis Oil market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (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 Wood Pyrolysis Oil Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Wood Pyrolysis Oil Market, Segmentation by Type:

Crude Fast Pyrolysis Oil

Stabilized Pyrolysis Oil

Upgraded Pyrolysis Oil

Global Wood Pyrolysis Oil Market, Segmentation by Product Grade:

Fuel Grade

Processing Grade

Chemical Grade

Global Wood Pyrolysis Oil Market, Segmentation by Production Technology:

Fast Pyrolysis

Catalytic Pyrolysis

Slow Pyrolysis with Liquid Recovery

Global Wood Pyrolysis Oil Market, Segmentation by Processing Level:

Raw Condensed Oil

Filtered and Settled Oil

Fractionated or Upgraded Oil

Global Wood Pyrolysis Oil Market, Segmentation by Application:

Industrial Energy

Utilities and District Heating

Petroleum Refining and Biofuels

Chemicals and Materials

Companies Profiled:

Twence Holding B.V.

Pyrocell AB

Bio?nergie AE C?te-Nord Canada Inc.

Kerry Group plc

Ensyn Corporation

Suzano S.A.

ONYM Group

Charm Industrial, Inc.

Key Questions Answered:

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

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