

# **Natural Oil Polyols (NOP) Market Analysis By Product (Soy Oil Polyols, Castor Oil Polyols, Palm Oil Polyols, Canola Oil Polyols, Sunflower Oil Polyols) And Segment Forecasts To 2020**

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## **Abstracts**

Global Natural Oil Polyols (NOP) market is anticipated to reach USD 7.92 billion by 2020. Shift in industry preference towards developing sustainable products owing to depleting fossil fuel reserves is expected to remain a key driving factor for global NOP market. Increasing polyurethane (PU) demand from automobile and infrastructure industries is also expected to fuel NOP growth over the forecast period. Volatile prices of petrochemicals coupled with growing environmental concerns regarding their production and usage is also expected to have a positive influence on the market growth. High extraction cost from sustainable resources is expected remain key challenge for market growth. Increasing investments for developing products targeting niche applications is anticipated to yield future opportunities for NOP manufacturers.

Soy oil polyols dominated the global market and accounted for 36.7% of total volume in 2013. Increasing demand for bio-based polyurethane from major end-use industries is expected to remain a key driving factor for this segment. Palm oil polyols are expected to witness the highest growth rate over the forecast period. The segment is expected to grow at an estimated CAGR of 7.4% from 2014 to 2020. Availability of palm oil in abundance particularly in South East Asia is expected to drive the demand for palm oil polyols over the next five years.

Further key findings from the study suggest:

Global NOP demand was 1,647.8 kilo tons in 2013 and is expected to reach 2,685.8 kilo tons by 2020, growing at a CAGR of 7.2% from 2014 to 2020.

North America emerged as a leading regional market for NOP and accounted for 44.5% of total market volume in 2013. The region is expected to continue its dominance over the forecast period on account of favorable government legislations. Asia Pacific is expected to witness the highest growth rate over the forecast period owing to growth of automobile and infrastructure industry. Asia Pacific is expected to grow at an estimated CAGR of 7.7% from 2014 to 2020.

Asia Pacific enjoys the advantage of abundant natural oil availability. Major South East Asian countries such as Malaysia and Indonesia are the leading producers of natural oils. In addition, growth of major end-use industries particularly in emerging markets of China and India is also expected to complement the regional market growth.

Moderately consolidated NOP industry participants compete on basis of technology. Key industry participants for NOP market include BASF SE, Cargill Inc., Huntsman Corporation, Biobased Technologies, Jayant Agro Organics Limited and Bayer Material Science AG.

For the purpose of this study, Grand View Research has segmented the natural oil polyols (NOP) market on the basis of product and region.

Global Natural Oil Polyols (NOP) Product Outlook (Volume, Kilo Tons; Revenue, USD Million, 2012 – 2020)

Soy Oil Polyols

Castor Oil Polyols

Palm Oil Polyols

Canola Oil Polyols

Sunflower Oil Polyols

Other NOP

Global Natural Oil Polyols (NOP) Regional Outlook (Volume, Kilo Tons; Revenue, USD Million, 2012 – 2020)

North America

Europe

Asia Pacific

RoW

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