

Crude Tall Oil Derivative Market Report by Fraction (Tall Oil Fatty Acid, Distilled Tall Oil, Tall Oil Rosin, Tall Oil Pitch, and Others), Application (Fuel and Fuel Additives, Surfactant, Mining and Oilfield Chemicals, Coating and Inks, Rubber, and Others), End User (Automotive, Construction, Speciality Chemicals and Petrochemicals, Oil and Gas, and Others), and Region 2025-2033

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Abstracts

The global crude tall oil derivative market size reached USD 2.1 Billion in 2024. Looking forward, IMARC Group expects the market to reach USD 3.0 Billion by 2033, exhibiting a growth rate (CAGR) of 3.62% during 2025-2033. Increased usage of chemical intermediates is primarily driving the market.

Crude Tall Oil Derivative Market Analysis:

Major Market Drivers: The rising construction activities worldwide and the growing demand for adhesives and sealants are propelling the market growth.

Key Market Trends: The increasing shift toward eco-friendly product formulations and extensive investment in green technologies are acting as growth-inducing factors.

Competitive Landscape: Some of the major market companies include Forchem Oyj (Respol Resinas S.A.), Ingevity Corporation, Kraton Corporation (DL Chemical Co. Ltd.), Les Dérivés Résiniques Et Terpéniques (Firmenich

International SA), Mercer International Inc., Neste Oyj, Pine Chemical Group Oy, Segezha Group, Silver Fern Chemical Inc., SunPine AB, and Univar Solutions Inc., among many others.

Geographical Trends: According to the crude tall oil derivative market analysis report, North America dominates the market due to its advanced biorefinery infrastructure, extensive production of pulp and paper, and the increasing demand for bio-based chemicals across various industries.

Challenges and Opportunities: The fluctuating availability of raw materials is hindering the market. However, investing in sustainable forestry practices and expanding sourcing from multiple regions to ensure a stable supply chain will continue to strengthen the market growth.

Crude Tall Oil Derivative Market Trends:

Growing Use of Renewable Raw Materials

The increasing focus on sustainability is leading to a higher demand for renewable raw materials in various industries, including chemicals, adhesives, and lubricants. Crude tall oil derivatives, extracted from renewable sources, are becoming preferred alternatives to traditional petrochemicals, which is escalating the crude tall oil derivative market demand. For example, in February 2024, Kraton Corporation launched SYLVASOLV biobased oils derived from crude tall oil, enhancing sustainability and performance in adhesives and lubricants.

Increasing Adoption in Biofuel Production

Crude tall oil derivatives are becoming a key component in biodiesel production with the global push towards reducing carbon emissions and increasing adoption of biofuels. This trend is particularly strong in regions with stringent environmental regulations, where there is a significant drive to replace fossil fuels with renewable energy sources. For instance, in May 2024, the EU amended its rule to include crude tall oil as a feedstock for advanced biofuels, helping to increase the use of renewable energy and support sustainability goals. This is positively impacting the crude tall oil derivative market forecast report.

Global Benchmarking of Crude Derivatives

As global markets evolve, there is a growing trend towards benchmarking various crude derivatives, including crude tall oil derivatives, owing to recognized environmental standards. This shift is primarily driven by the need for consistency and transparency in pricing, which is essential for fostering trust and facilitating trade on an international scale. For instance, in March 2024, Bloomberg launched the Commodity Murban Crude Oil Index, signaling a growing trend in global benchmarking that could influence pricing strategies for crude tall oil derivatives.

Global Crude Tall Oil Derivative Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global crude tall oil derivative market forecast at the global, regional, and country levels from 2025-2033. Our report has categorized the market based on fraction, application, and end user.

Breakup by Fraction:

Tall Oil Fatty Acid

Distilled Tall Oil

Tall Oil Rosin

Tall Oil Pitch

Others

Tall oil fatty acid dominates the crude tall oil derivative market share

The report has provided a detailed breakup and analysis of the market based on the fraction. This includes tall oil fatty acid, distilled tall oil tall oil rosin, tall oil pitch, and others. According to the report, tall oil fatty acid represented the largest market segmentation.

Tall oil fatty acid dominates the market due to its widespread use in producing soaps, detergents, and emulsifiers. Leading companies are developing TOFA-derived surfactants, emulsifiers, and additives designed for enhanced performance in industrial

applications.

Breakup by Application:

Fuel and Fuel Additives

Surfactant

Mining and Oilfield Chemicals

Coating and Inks

Rubber

Others

Fuel and fuel additives acid dominates the crude tall oil derivative market

The report has provided a detailed breakup and analysis of the market based on the application. This includes fuel and fuel additives, surfactant, mining and oilfield chemicals, coating and inks, rubber, and others. According to the report, fuel and fuel additives represented the largest market segmentation.

Fuel and fuel additives acid leads the market because of their significant use in improving fuel performance and lowering emissions. It is a key component in producing biodiesel, which is increasingly in demand. This is positively influencing the crude tall oil derivative market outlook.

Breakup by End User:

Automotive

Construction

Speciality Chemicals and Petrochemicals

Oil and Gas

Others

The report has provided a detailed breakup and analysis of the market based on the end user. This includes automotive, construction, speciality chemicals and petrochemicals, oil and gas, and others.

Crude tall oil derivatives find applications across automotive, construction, specialty chemicals, petrochemicals, oil and gas, and other industries due to their versatility in enhancing product performance, sustainability, and efficiency, driving demand in these diverse sectors.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America dominates the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

According to the crude tall oil derivative market outlook report, North America dominates the market due to its well-established pulp and paper industry, which produces significant amounts of crude tall oil. In addition to this, the region's advanced refining capabilities and high demand across industries, such as adhesives, biofuels, and lubricants, reinforce its leading position. For instance, in February 2024, Aramco started trading a U.S. crude oil grade that underpins the global Brent benchmark in a process

run by oil-index publisher S&P Global Commodity Insights.

Competitive Landscape:

The crude tall oil derivative market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major market companies have also been provided. Some of the key players in the market include:

Forchem Oyj (Respol Resinas S.A.)

Ingevity Corporation

Kraton Corporation (DL Chemical Co. Ltd.)

Les Dérivés Résiniques Et Terpéniques (Firmenich International SA)

Mercer International Inc.

Neste Oyj

Pine Chemical Group Oy

Segezha Group

Silver Fern Chemical Inc.

SunPine AB

Univar Solutions Inc.

Key Questions Answered in This Report

- 1.What was the size of the global crude tall oil derivative market in 2024?
- 2.What is the expected growth rate of the global crude tall oil derivative market during 2025-2033?
- 3.What are the key factors driving the global crude tall oil derivative market growth?
- 4.What has been the impact of COVID-19 on the global crude tall oil derivative market?
- 5.What is the breakup of the global crude tall oil derivative market based on the

fraction?

6. What is the breakup of the global crude tall oil derivative market based on the application?

7. What are the key regions in the global crude tall oil derivative market?

8. Who are the key players/companies in the global crude tall oil derivative market?

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