

Oleochemicals Market Assessment, By Form [Solid, Liquid], By Type [Fatty Acids, Fatty Alcohols, Glycerol Esters, Fatty Amines, Fatty Acid Methyl Ester, Others], By Application [Personal Care & Cosmetics Ingredient, Food & Beverage Processing, Consumer Products, Polymer Additives, Textile Dyes, Paints & Inks, Pharmaceuticals, Paper Coatings, Others], By End-use Industry [Food & Beverage, Personal Care & Cosmetics, Polymers & Plastics, Textile, Building & Construction, Medical & Healthcare, Pulp & Paper, Others], By Region, Opportunities, and Forecast, 2016-2030F

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Abstracts

Global Oleochemicals Market size was valued at USD 21.73 billion in 2022, which is expected to grow to USD 36.23 billion in 2030 with a CAGR of 6.6% during the forecast period between 2023 and 2030. The increase in the demand for sanitization products to maintain superior hygiene standards in food & beverage manufacturing facilities, along with the recent product innovations related to the personal care & cosmetics ranges with oleochemical ingredients are the significant determinants accelerating the market growth.

The increasing government standards for ensuring higher quality production in food manufacturing plants and the recently inaugurated food & beverage production facilities are the key trends driving the adoption of sanitizers for food contact surfaces. In

addition, the growth of the personal care & cosmetics industry is attributed to vital aspects such as a shift in the focus of gender-specific personal care products, the inclusion of natural ingredients, and the increasing trend for high-end luxury cosmetics products. Thus, the increase in the deployment of sanitization production in the food & beverage facilities coupled with the booming cosmetics & personal care sector are the prime factors driving the demand for oleochemicals as an alternative to petroleum-based chemicals. This, in turn, is augmenting the oleochemicals market growth.

Rising Production Activities Associated with Cleaning Products is Spurring the Traction for the Oleochemicals Market Growth

The oleochemicals, including fatty acids and fatty alcohols, are utilized as a starting chemical in cleaning products to ensure higher performance efficiency. As a result, oleochemicals are ideal for cleaning chemical products such as detergents, surfactants, and soaps. The growing awareness associated with health & safety regulations and increasing demand for sustainable cleaning products are driving the adoption of cleaning products.

For illustration, according to the International Association for Soaps, Detergents and Maintenance Products (A.I.S.E.), in 2022, the European home cleaning products market, including detergents, dishwashing soaps, and soaps was valued at USD 35.9 billion (Euro 34.1 billion), representing a year-on-year growth rate of 5.2%. Hence, the increase in the production of cleaning products is boosting the demand for oleochemicals as the materials are vital ingredients for household and industrial cleaning products, thereby supplementing the market growth.

The Increasing Adoption of Fatty Acids will Foster Market Growth

The key benefits associated with fatty acids include superior anti-aging properties, enhanced dissolution, and excellent energy sources. Thus, due to the above-listed benefits, fatty acids are ideal for various end-use industries such as cosmetics & personal care, pharmaceuticals, and food. The manufacturers of oleochemicals are implementing technology advancement strategies to enhance the production capabilities of fatty acids and ensure superior cost-effectiveness.

For instance, in June 2023, Novozymes, an oleochemicals manufacturer in Denmark, introduced enzymatic Pre-Splitting technology to ensure 30% cost savings for fatty acids production. Therefore, the recent technological innovations will fuel the production of fatty acids. As a result, the fatty acid availability in the market will increase, which, in

turn, will create a prominent potential for market growth in the upcoming years.

Growth of the Various End-use Industries in Asia-Pacific is Boosting Revenue Expansion

The growth of the end-use industries such as food & beverage, pharmaceuticals, and cosmetics & personal care are attributed to factors, including the presence of established market players in the region, the easy availability of raw materials & labor, and the pro-government measures.

For instance, according to the Government of India, Ministry of Chemicals & Fertilizers Department of Pharmaceuticals, in 2021-22, the annual turnover of pharmaceuticals products in India was USD 46.11 billion (INR 3,441.25 billion), an increase of 4.89%. Henceforth, the advancements of the end-use industries, including pharmaceuticals, food & beverage, and cosmetics & personal care sectors are driving the demand for oleochemicals in the Asia Pacific region, which is amplifying the market growth.

Future Outlook Scenario

The recent strategies to increase the local manufacturing of pharmaceutical products in the country will propel the pharmaceutical industry growth in the coming years. For instance, according to the India Brand Equity Foundation (IBEF), in 2021, the Indian pharmaceutical industry was valued at USD 42.0 billion and will reach USD 65.0 billion and USD 130.0 billion by 2024 and 2030, respectively. Thus, the revenue expansion of the pharmaceutical industry in the upcoming years will create a lucrative opportunity for the market in the long run.

Household cleaning product manufacturers are eliminating the deployment of fossil fuels to ensure long-term sustainability targets. For instance, in September 2020, Unilever, a global player in household cleaning products announced the elimination of fossil fuels in cleaning products by 2030. Therefore, the long-term sustainability targets will encourage the adoption of natural ingredients such as oleochemicals, thereby creating a prominent potential for market growth.

The food and beverage manufacturers are expanding their manufacturing base with investment in new manufacturing facilities development to increase the supply of product products. For instance, in September 2023, KT&G Corp. announced its plans to develop a new food manufacturing facility in Indonesia. The KT&G Corp. food production facility construction will be completed by 2026. As a result, the development

of a new manufacturing facility will boost the demand for oleochemicals, which, in turn, will create a favorable growth outlook for the market during the projected forecast period.

Key Players Landscape and Outlook

The prominent players in the Oleochemicals market are Arkema, Emery Oleochemicals, Kao Corporation, and Vantage Specialty Chemicals. The above players involved in the manufacturing and supply of oleochemicals, such as glycerol esters and fatty amines are investing in strategies, including technology innovation, acquisitions, product innovations, and facility development to increase their market revenue and volume share in the oleochemicals industry.

For instance, in June 2023, Oleon N.V., a leading manufacturer of oleochemicals in Belgium, opened a new manufacturing facility in the country. The major focus of the launch of the new manufacturing facility was to increase the market share of Oleon N.V. in the European region.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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