

Epoxidized Soybean Oil Market by Raw Material (Soybean Oil, Hydrogen Peroxide), Application (Plasticizers, UV Cure Applications, Fuel Additives), End-use Application (Foods & Beverages, Adhesives & Sealants, Automotives) - Global Forecast to 2028

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Abstracts

The global epoxidized soybean oil market size is projected to grow from USD 494 million in 2023 to USD 648 million by 2028, at a CAGR of 5.6% during the forecast period. In recent times, a heightened global awareness of the environmental repercussions associated with conventional plasticizers has led to an increased demand for environmentally friendly alternatives. This shift in consumer preferences and regulatory standards has positioned epoxidized soybean oil (ESBO) as a pivotal player in the plasticizer industry. While plasticizers play a vital role in enhancing the flexibility and durability of plastics, traditional phthalate-based plasticizers have raised environmental and health concerns, prompting a shift towards sustainable alternatives like epoxidized soybean oil. ESBO is a powerful substitute for traditional phthalates, resulting in numerous advantages that complement the increasing demand for eco-friendly solutions. Notably, ESBO is sourced from a renewable and abundant resource — soybeans — making it more sustainable option compared to phthalates derived from petrochemical sources. This renewable origin does not only reduce reliance on fossil fuels, but also contributes to reducing the environmental footprint associated with plasticizer production. Increasing adoption of ESBO is anticipated to be a crucial factor in boosting market growth throughout the forecast period.

“In terms of both value and volume, Soybean oil raw material segment led the epoxidized soybean oil during the forecast period.”

Soybean oil is widely available and cost-effective vegetable oil on a global scale, serves

diverse purposes in both edible products and non-edible items such as caulks, mastics, plastics, and resins. Research conducted by the USDA-ARS Oil Chemical Research Unit suggests that soybean oil can offer a substantial alternative to petroleum-based resins, primarily due to its environmentally friendly characteristics in comparison to petroleum products. This eco-friendly attribute has positioned soybean oil as a prominent choice in industrial applications. With its rich carbon-carbon double bonds, soybean oil plays a pivotal role in the epoxidation process, serving as a critical starting point for the epoxidation process. This chemical transformation involves the reaction of soybean oil with a per carboxylic acid or peroxide, typically hydrogen peroxide, resulting in the introduction of epoxide groups into the soybean oil structure. The resultant Epoxidized Soybean Oil (ESBO), enriched with these epoxide groups, displays heightened reactivity with plasticizers, a crucial quality that makes ESBO an effective plasticizer. As a derivative of soybean oil, ESBO acts both as a plasticizer and stabilizer in the production of PVC compounds and various plastic materials. Beyond enhancing the flexibility and durability of PVC, ESBO significantly contributes to the overall performance and processing characteristics of the final plastic products. The use of soybean oil in ESBO production is based on environmentally conscious practices, providing a renewable and sustainable substitute for conventional petroleum-based resources in the creation of eco-friendly plasticizers.

“In terms of both value and volume, Plasticizers are projected to be the fastest-growing application segment during the forecast period for epoxidized soybean oil.”

Plasticizers play a crucial role in enhancing the flexibility and usability of plastics. The function of plasticizers is similar to that of lubricants, interacting with polymer chains to reduce their mutual interactions, enabling easier movement between chains and resulting in a more malleable plastic. Various types of plasticizers, like phthalates, adipates, epoxidized soybean oil (ESBO), and citrates, offer diverse properties for various applications. However, careful consideration is required due to potential environmental concerns and the risk of weakening plastics. ESBO, derived from soybean oil, is a biobased plasticizer with renewable sourcing, reduced environmental impact, and the potential to improve properties like heat resistance. Despite challenges like higher cost and compatibility issues, ESBO is a noteworthy advancement in eco-friendly and high-performance plasticizers. As sustainability gains importance, biobased alternatives like ESBO contribute to a greener future for the plastic industry.

“In terms of value, the Asia Pacific epoxidized soybean oil market is projected to grow at the highest CAGR during the forecast period.”

The Asia-Pacific (APAC) region is anticipated to experience the most significant Compound Annual Growth Rate (CAGR) from 2023 to 2028, both in terms of value and volume. The region benefits from high growing end-use industries, economic growth rate, low manufacturing costs, and low cost labor due to an adequate supply of raw materials. China, India, and Japan play pivotal roles in driving the growth of the Asia Pacific epoxidized soybean oil market, contributing to a 31.0% share in 2022.

In-depth interviews were conducted with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from various key organizations operating in the epoxidized soybean oil market.

By Company Type: Tier 1: 40%, Tier 2: 25%, and Tier 3: 35%

By Designation: C Level: 35%, Director Level: 30%, and Others: 35%

By Region: North America: 25%, Europe: 20%, APAC: 45%, Middle East & Africa: 5%, and South America: 5%

Companies Covered: The global epoxidized soybean oil market comprises major manufacturers, such as CHS Inc. (US), Nan Ya Plastics Corporation (Taiwan), Adeka Corporation (Japan), Cargill (US), and Valtris (US), Galata Chemicals LLC (US), Hairma Chemicals (GZ) Ltd. (China), Shandong Longkou Longda Chemical Industry Co., Ltd. (China), Guangzhou Xinjinlong Chemical Additives Co. Ltd. (China), Inbra Ind?strias Qu?micas, Ltda.(Brazil) among others.

Research Coverage

The market study covers the epoxidized soybean oil market across various segments. It aims at estimating the market size and the growth potential of this market across different segments based on raw material, application, end-use industry, and region. The study also includes an in-depth competitive analysis of key players in the market, their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to improve their position in the epoxidized soybean oil market.

Key Benefits of Buying the Report

The report is expected to help the market leaders/new entrants in this market share the

closest approximations of the revenue numbers of the overall epoxidized soybean oil market and its segments and sub-segments. This report is projected to help stakeholders understand the competitive landscape of the market, gain insights to improve the position of their businesses, and plan suitable go-to-market strategies. The report also aims to help stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Rising demand for eco-friendly plasticizers, Biocompatible lubricants – an emerging alternatives for mineral oil-based lubricant, Easy availability of ESBO in large volume and at low price – competitive advantage over the other bio-based oils, and Superior performance properties will augment the demand), restraints (Fluctuating raw material prices, and Health hazardous due to excess usage of ESBO in food & beverages industry), opportunities (Growing prominence of phthalate-free stabilizers – opportunity for ESBO producers in PVC applications to maximize their market share) and challenges (Competition from other bio-based plasticizers).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the epoxidized soybean oil market

Market Development: Comprehensive information about lucrative markets – the report analyses the epoxidized soybean oil market across varied regions

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the epoxidized soybean oil market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players like CHS Inc. (US), Nan Ya Plastics Corporation (Taiwan), Adeka Corporation (Japan), Cargill (US), and Valtris (US), Galata Chemicals LLC (US), Hairma Chemicals (GZ) Ltd. (China), Shandong Longkou Longda Chemical Industry Co., Ltd. (China), Guangzhou Xinjinlong Chemical Additives Co. Ltd. (China), Inbra Ind?stria Qu?mica, Ltda. (Brazil) among others in the epoxidized soybean oil market. The report also helps stakeholders understand the pulse of the epoxidized soybean oil market and provides them with information on key market drivers, restraints, challenges,

and opportunities.

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