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Tallow Amine Market Forecasts to 2032 – Global Analysis By Chemical Structure (Primary Tallow Amine, Secondary Tallow Amine and Tertiary Tallow Amine), Material Origin (Animal-Derived, Plant-Based and Synthetic), Form (Solid and Liquid), Function, End User, and By Geography

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Abstracts

According to Stratistics MRC, the Global Tallow Amine Market is accounted for $1.98 billion in 2025 and is expected to reach $2.68 billion by 2032 growing at a CAGR of 4.4% during the forecast period. Tallow amine is a fatty amine derived from animal fats, typically through the hydrogenation of tallow-based fatty acids. It appears as a yellowish liquid or waxy solid and is widely used as a surfactant, emulsifier, and corrosion inhibitor. Common end users include agriculture, textiles, and industrial processing, where it aids in improving product performance through its surface-active properties and hydrophobic-lipophilic balance. Its formulation varies based on specific industrial needs.

According to USDA ERS, U.S. imports of animal fats, including tallow, rose significantly: processed oil imports doubled to ~3 billion pounds from 2022 to 2023.

Market Dynamics:

Driver:

High demand for biodegradable surfactants

The tallow amine market is propelled by growing demand for biodegradable surfactants, particularly in agricultural and industrial applications. As awareness of environmental

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sustainability intensifies, industries are shifting toward eco-friendly solutions for crop protection and water treatment. Surfactants based on tallow amines are preferred for their ability to improve the performance and efficiency of fertilizers, herbicides, and personal care products. This sustained demand for biodegradable alternatives, coupled with stringent regulations encouraging greener practices, is expected to reinforce market expansion.

Restraint:

Raw material price volatility

Tallow is derived from animal fats as a result, its market price can fluctuate sharply due to changes in livestock supply, feed costs, and shifting consumer preferences. These fluctuations directly impact production costs, leading to inconsistent profit margins and complicating long-term planning for manufacturers. Also, the availability of cheaper synthetic and bio-based options makes prices more unstable, forcing companies to find better ways to source materials and cut costs.

Opportunity:

Green chemistry & bio-based innovations

Companies are increasingly investing in research and development to create sustainable, high-performance tallow amine products that appeal to environmentally conscious consumers. Moreover, the expanding application scope in agricultural, water treatment, and personal care industries alongside emerging demand from Asia Pacific and Latin America offers substantial growth potential. These trends, coupled with regulatory support for bio-based chemicals, present a path for innovation-driven companies to secure a competitive advantage.

Threat:

Regulatory & animal sourcing scrutiny

Regulatory and animal sourcing scrutiny poses a significant threat to the tallow amine market. Derived from animal fats, tallow-based products are increasingly scrutinized due to ethical, environmental, and health-related concerns. Regulatory agencies in regions like the EU and North America have tightened compliance standards around animal-derived chemicals, particularly in agricultural and industrial applications.

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Moreover, rising consumer demand for plant-based or synthetic alternatives is shifting industry preferences.

Covid-19 Impact:

The Covid-19 pandemic initially disrupted tallow amine market dynamics through supply chain interruptions, labor shortages, and reduced manufacturing activity. However, essential sectors such as agriculture, personal care, and water treatment ensured a steady demand, mitigating overall impact. The crisis also accelerated shifts toward local sourcing and heightened the need for resilient, sustainable supply chains. While there were short-term setbacks, the pandemic ultimately reinforced long-term trends favoring biodegradable and eco-friendly chemical solutions.

The primary tallow amine segment is expected to be the largest during the forecast period

The primary tallow amine segment is expected to account for the largest market share during the forecast period. This dominance is attributed to its widespread use as a surfactant and emulsifier in agricultural chemicals, especially herbicides and insecticides. The effectiveness of primary tallow amines in applications requiring strong cationic surfactants, coupled with their favorable performance in personal care and water treatment solutions, underpins their leading market position. Furthermore, well-established supply networks and consistent end-user demand solidify the segment's continued expansion.

The plant-based (bio-based) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the plant-based (bio-based) segment is predicted to witness the highest growth rate. This trajectory reflects a broader market shift toward sustainable and animal-free alternatives, driven by rising concerns over animal welfare and regulatory directives. Bio-based amines are gaining traction due to their comparable functional performance and compatibility with green chemistry goals. As demand for eco-friendly surfactants in agriculture, personal care, and water treatment continues to surge, manufacturers are rapidly expanding their bio-based product portfolios to capitalize on these evolving consumer and policy preferences.

Region with largest share:

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During the forecast period, the Asia Pacific region is expected to hold the largest market share. This growth is primarily fueled by the region’s robust agricultural sector, rapid industrialization, and expanding end-use industries such as personal care and water treatment. Significant investments in agrochemical infrastructure and ongoing urbanization in countries like China and India further accelerate regional demand. The presence of leading manufacturers, coupled with favorable government initiatives supporting industrial and technological advancements, ensures Asia Pacific’s continued dominance in global market share.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. The region’s dynamic economic development, rising consumer awareness of sustainability, and ongoing expansion of agricultural and industrial activities are the principal drivers behind this growth. Additionally, increasing adoption of modern farming practices and stringent environmental regulations fosters greater uptake of biodegradable chemicals across key markets, reinforcing Asia Pacific's standing as both the largest and fastest-growing regional market.

Key players in the market

Some of the key players in Tallow Amine Market include Akzo Nobel N.V., Kao Corporation, Nouryon, Clariant AG, Huntsman Corporation, Indo Amines Ltd., Croda International, Stepan Company, Solvay, Air Products and Chemicals, SABIC, Kraton, BASF SE, Oriental Union Chemical Corporation, SINO-JAPAN CHEMICAL CO., LTD., JiangYin HuaYuan Chemical Co., Ltd., Shandong Paini Chemical Co., Ltd., Shandong Kerui, Prasol Chemicals Pvt Ltd., and Matangi Industries.

Key Developments:

In June 2025, Akzo Nobel N.V. has signed an agreement to sell its shareholding in Akzo Nobel India Limited (ANIL) to the JSW Group, one of India’s leading diversified conglomerates. The transaction is based on a total enterprise value of approximately €1.4 billion, representing an EV/EBITDA multiple of 22x, and includes AkzoNobel’s liquid paints and coatings business in India. The India Powder Coatings business and International Research Center, both currently part of ANIL, will be retained by AkzoNobel under full ownership.

In May 2023, Huntsman, a global manufacturer and marketer of differentiated and

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specialty chemicals, announces that its Performance Products division has expanded its manufacturing site in Conroe, Texas to better serve the growing needs of its global customers in the semiconductor industry.

In February 2022, Kao Corporation has decided to build a new tertiary amine production plant in Pasadena, Texas, United States, mainly to meet growing demand for sterilizing/cleaning applications but also for wide range of other industrial applications. Because of Kao's unique catalyst technology, its tertiary amines are of superior quality. Kao has the world's largest production capacity with three production sites in Japan, the Philippines, and Germany. By establishing a new production plant in the U.S., Kao will strengthen its stable supply system for the U.S. market, which is expected to grow in the mid%-%to long-term. By further improving the efficiency of its supply chain, Kao aims to reduce CO2 emissions and its ecological footprint.

In May 2022, HOUSTON (ICIS) Japan’s Kao Corporation announced plans to build a new tertiary amine production plant Pasadena, Texas, mainly to meet growing demand for sterilizing/cleaning applications but also for a wide range of other industrial applications, the company said in a news release. The new US production is scheduled to begin operations in January 2025 and will have an annual production capacity of 20,000 tonnes/year.

Chemical Structures Covered:

- Primary Tallow Amine
- Secondary Tallow Amine
- Tertiary Tallow Amine

Material Origins:

- Animal-Derived
- Plant-Based (Bio-Based)
- Synthetic

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Forms Covered:

- Solid
- Liquid

Functions Covered:

- Emulsifier
- Dispersant
- Corrosion Inhibitor
- Flotation Agent
- Other Functions

End Users Covered:

- Agriculture
- Personal Care & Cosmetics
- Textile & Leather Industry
- Oil & Gas
- Water Treatment Facilities
- Mining Industry
- Industrial Processing
- Other End Users

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Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia
  - New Zealand
  - South Korea
  - Rest of Asia Pacific

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South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

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  - SWOT Analysis of key players (up to 3)
- Regional Segmentation
  - Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)
- Competitive Benchmarking
  - Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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($MN)
Table 27 Global Tallow Amine Market Outlook, By Other End Users (2024-2032) ($MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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