

# **Crude Tall Oil Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Tall Oil Rosin, Tall Oil Fatty Acids, Distilled Tall Oil, all Oil Pitch, Others), By Application (Adhesive, Inks & Toners, Partings & Coatings, Hygiene Products, Others), By End User (Automotive, Chemicals, Metalworking, Electronics & Electricals, Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Crude Tall Oil (CTO) market is projected to expand significantly, growing from USD 2.41 Billion in 2025 to USD 3.07 Billion by 2031, at a Compound Annual Growth Rate (CAGR) of 4.12%. CTO, a viscous byproduct derived from the Kraft pulping process in paper manufacturing, is primarily composed of fatty acids, rosins, and neutral compounds. This market's upward trajectory is primarily fueled by the increasing global demand for renewable biofuels, particularly renewable diesel and sustainable aviation fuel, as well as the continuous need for bio-based chemicals in various applications such as adhesives, inks, and coatings. These factors collectively drive the market as industries increasingly seek sustainable, non-fossil feedstocks to comply with environmental regulations and carbon reduction objectives. However, a major constraint for the market is the availability of feedstock, as CTO production is inherently inelastic and directly dependent on the operational output of the softwood pulp industry. This supply limitation restricts production volumes, irrespective of growing downstream demand. Europe remains a critical region for forest industry exports, accounting for 59 percent of the total export value in 2024, according to the Finnish Forest Industries Federation. This highlights the market's substantial reliance on established European pulping infrastructure and the regional concentration that dictates

global supply chain dynamics.

## **Market Driver**

The primary catalyst for the Crude Tall Oil market is the escalating global demand for sustainable biofuels and renewable diesel, reflecting the energy sector's aggressive transition towards low-carbon feedstocks. Refineries are increasingly utilizing this biomass residue to produce Hydrotreated Vegetable Oil and Sustainable Aviation Fuel, which are crucial for achieving carbon reduction targets in the transportation sector. This growing need has prompted major industry players to maintain high processing capacities to ensure a steady supply of feedstock. For instance, SunPine reported an annual production capacity of approximately 200,000 tons of raw tall diesel at its Piteå facility in 2024, serving the European market. The strong momentum in this sector is further supported by robust downstream consumption, with Neste reporting a rise in sales volume of renewable products to 3.73 million tons for the full year 2024, as per their February 2025 'Financial Statements Release'. Simultaneously, the increasing adoption of bio-based chemicals as alternatives to petrochemicals significantly propels market development. Manufacturers of adhesives, inks, and coatings are actively transitioning to pine chemical derivatives, obtained through fractionation, to lessen their dependence on fossil-based ingredients and enhance the sustainability profiles of their products. This industrial shift encourages substantial investments in biorefining infrastructure aimed at improving yield and efficiency. A notable example is Kraton Corporation's finalization of a \$35 million investment in June 2025 to upgrade crude tall oil biorefinery towers at its Panama City facility, as detailed in its '2024 Sustainability Report'. Such strategic enhancements enable fractionation companies to better meet the rising demand for sustainable fatty acids and rosins across diverse industrial applications.

## **Market Challenge**

The inelasticity of feedstock availability represents a critical structural hurdle that significantly impedes the growth of the Global Crude Tall Oil Market. Since Crude Tall Oil (CTO) is produced exclusively as a byproduct of the Kraft pulping process, its supply is rigidly tied to the operational output of the softwood pulp industry, rather than directly responding to market demand for CTO itself. Consequently, producers are unable to independently scale extraction volumes to capitalize on the surging requirements from sectors like renewable diesel and sustainable aviation fuel. This leads to a supply bottleneck that stifles potential market expansion whenever the primary paper and pulp industry experiences stagnation or decline due to factors such as digitalization or

broader economic shifts. This fundamental dependency renders the CTO market vulnerable to fluctuations within its parent industry, effectively capping growth despite strong downstream interest. The impact of this limitation is evident in recent production contractions observed in key manufacturing regions. For example, the Finnish Forest Industries Federation reported that in the third quarter of 2025, pulp production totaled 1.6 million tonnes, marking a 13.7 percent decline compared to the same period in the previous year. Such significant reductions in primary pulp output directly restrict the recoverable volume of CTO, thereby hindering the industry's capacity to secure sufficient feedstock to meet global renewable energy targets.

## **Market Trends**

The integration of Crude Tall Oil (CTO) into Sustainable Aviation Fuel (SAF) value chains is fundamentally transforming refinery operations, prompting producers to retrofit existing hydrotreating units to yield higher-margin aviation outputs. This trend, unlike earlier biofuel applications focused on ground transport, necessitates complex technical modifications to desulfurization and dearomatization units to process the specific chemistry of tall oil while adhering to stringent jet fuel standards. This operational shift allows refineries to maximize the value of limited biomass streams by targeting the rapidly expanding aviation sector. Preem, for instance, in June 2025, announced the inauguration of its rebuilt Synsat facility, which expanded renewable production capacity by approximately 900,000 cubic meters annually, directly enabling large-scale co-processing of renewable raw materials for aviation and diesel markets. Concurrently, the market is experiencing a proliferation of strategic alliances and asset acquisitions, driven by the intense competition for feedstock access and the desire to optimize vertical integration. As supply inelasticity becomes more pronounced, specialized pine chemical companies are acquiring dedicated refining assets to gain control over the entire processing value chain—from raw material to finished derivative. This strategy ensures consistent throughput despite potential fluctuations in pulp mill output. Such consolidation enables firms to mitigate volatility and capture specialized market segments effectively. A notable example is Ingevity Corporation's announcement in September 2025 of a definitive agreement to divest its crude tall oil refining assets for approximately \$110 million, transferring processing control to Mainstream Pine Products to enhance operational focus.

## **Key Market Players**

Kraton Corporation

UPM-Kymmene Corporation

Stora Enso Oyj

Georgia-Pacific LLC

Pine Chemical Group

Foreverest Resources Ltd.

Ingevity Corporation

Segezha Group

Mercer International Inc.

Eastman Chemical Company

## **Report Scope**

In this report, the Global Crude Tall Oil Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Crude Tall Oil Market, By Product

Tall Oil Rosin

Tall Oil Fatty Acids

Distilled Tall Oil

all Oil Pitch

Others

### Crude Tall Oil Market, By Application

Adhesive

Inks & Toners

Partings & Coatings

Hygiene Products

Others

#### Crude Tall Oil Market, By End User

Automotive

Chemicals

Metalworking

Electronics & Electricals

Others

#### Crude Tall Oil Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Crude Tall Oil Market.

## **Available Customizations:**

*Crude Tall Oil Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (...)*

Global Crude Tall Oil Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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