

# North America Lignin Market Size and Forecast (2021 - 2031)

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## Abstracts

The North America Lignin Market is projected to grow significantly, with an expected market size of approximately US\$ 135,975.9 thousand by 2031, up from US\$ 87,278.9 thousand in 2023. This growth represents a compound annual growth rate (CAGR) of 5.7% from 2023 to 2031.

### Executive Summary and Market Analysis

Lignin, a complex organic polymer found in the cell walls of plants, is increasingly recognized for its utility in various industries, particularly in animal feed. Its composition includes microcellulose, which enhances feed conversion rates, making it a valuable additive in animal nutrition. The demand for lignin in animal feed is expected to rise, driven by the growing animal feed production in North America. According to the 2022 Alltech Agri-Food Outlook, North America is the third-largest producer of compound feed globally, with a production volume of 252.9 million tons, reflecting a 1.9% increase from the previous year. This trend indicates a robust growth trajectory for the lignin market as animal feed manufacturing expands.

Moreover, the U.S. Department of Energy and Agriculture is actively promoting the use of biomass in the energy and chemical sectors to enhance environmental sustainability. The department aims to increase the share of renewable feedstocks in commodity chemicals and materials from 5% in 2005 to 25% by 2030. Lignocellulosic biomass, which includes lignin, is a cost-effective renewable carbon source that can be utilized in various chemical processes and biofuels. Researchers in North America are focusing on developing lignin-based polymer biocomposites as alternatives to petroleum-based materials, aligning with sustainability goals and further driving the demand for lignin.

### Market Segmentation

The North America Lignin Market can be segmented based on type, form, and application:

**By Type:** The market is divided into Lignosulfonates, Kraft Lignin, High Purity Lignin, Hydrolysis Lignin, and Others. In 2023, Lignosulfonates held the largest market share.

**By Form:** The market is categorized into Solid and Liquid forms, with solids dominating the market in 2023.

**By Application:** The applications of lignin include Concrete Additives, Plastics and Polymers, Animal Feed, Water Treatment, Dyes and Pigments, Activated Carbon, Agriculture, Biofuels, and Others. The 'Others' category accounted for the largest share in 2023.

## Market Outlook

Lignin's unique properties, such as its aromatic structure and high energy content, make it suitable for a wide range of industrial applications. Its increasing use in construction, paper and pulp, agriculture, and biofuels is notable. In the construction sector, lignin serves as a set retardant and water-reducing agent in cement production, enhancing the compressive strength of concrete and contributing to lower carbon emissions during production. This sustainable approach to concrete manufacturing is a significant driver of lignin demand.

Currently, less than 2% of lignin is utilized as a dispersant, surfactant, or wood adhesive, while the majority is used as a combustion fuel in biomass processes. Lignin is also a major natural source of aromatic compounds, which can potentially replace petroleum-based chemicals. As consumers increasingly prefer eco-friendly products, the demand for bio-based and renewable solutions is on the rise. This shift has led manufacturers to innovate and produce lignin-based products, including bio-based plastics, resins, binders, composites, bio-asphalt, biofuels, and bio-coatings. For example, Lignin Industries AB launched Renol, a lignin-based material designed to replace fossil-based plastics in various applications, demonstrating lignin's versatility and potential in sustainable product development.

In the animal feed sector, lignin is recognized for its multiple functionalities that enhance productivity. Purified Alcell lignin has shown prebiotic effects in poultry, promoting beneficial gut bacteria and improving intestinal health. This has led to increased adoption of lignin as a natural feed additive by manufacturers, further propelling market growth.

## Country Insights

The North America Lignin Market is primarily segmented into the United States, Canada, and Mexico, with the United States holding the largest market share in 2023.

The U.S. is increasingly embracing bio-based materials due to rising environmental concerns. The BioPreferred Program Catalog, as of June 2021, lists over 16,000 registered bio-based products across various sectors, including agriculture, forestry, and biorefining. Lignin's abundance and potential for diverse industrial applications are gaining significant attention in the U.S. market.

#### Key Players

Prominent companies in the Lignin Market include Tokyo Chemical Industry Co. Ltd, Nippon Paper Industries Co. Ltd, UPM-Kymmene Corp, Stora Enso Oyj, West Fraser Timber Co. Ltd, and others. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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