

**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, By Competition, 2020-2030F**

Market Report | 2025-03-28 | 188 pages | TechSci Research

**AVAILABLE LICENSES:**

- Single User License \$4500.00
- Multi-User License \$5500.00
- Custom Research License \$8000.00

**Report description:**

The Global Crude Tall Oil Market was valued at USD 2.3 Billion in 2024 and is expected to reach USD 3.0 billion by 2030 with a CAGR of 4.1% through 2030. The Global Crude Tall Oil (CTO) Market is primarily driven by the rising demand for bio-based and sustainable products across various industries. CTO, a by-product of the Kraft pulping process, serves as an eco-friendly alternative to petroleum-based products. Its use in biofuels is growing significantly due to increasing renewable energy initiatives and global efforts to reduce carbon emissions.

Additionally, the expanding demand for CTO-derived specialty chemicals, such as adhesives, inks, and coatings, particularly in the construction and packaging sectors, is a major growth factor. The rising use of Tall Oil Fatty Acids (TOFA) in lubricants, soaps, and surfactants further strengthens the market. CTO is also gaining traction in the personal care industry, where consumers are increasingly favoring natural and eco-friendly ingredients.

The growth of the pulp and paper industry, particularly in emerging economies, ensures a steady supply of CTO, while advancements in refining technologies have improved its yield and efficiency. The Asia-Pacific region, with its rapid industrialization, and increasing renewable energy investments, particularly in China and India, are significant growth areas. Furthermore, governmental regulations promoting sustainability and renewable resources continue to bolster the global CTO market.

Key Market Drivers

Rising Demand for Bio-based Products and Renewable Energy Solutions

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

The increasing global focus on sustainability and the shift away from fossil fuels are key drivers for the Global Crude Tall Oil (CTO) Market. As a by-product of the Kraft pulping process, CTO is a renewable and bio-based resource, making it an ideal substitute for petroleum-derived products in various industrial applications. Environmental concerns, coupled with stringent governmental regulations to reduce carbon footprints, are encouraging industries to adopt CTO for biofuels, specialty chemicals,

### Key Market Challenges

#### Fluctuating Raw Material Supply and Dependency on the Pulp and Paper Industry

One of the primary challenges faced by the Global Crude Tall Oil (CTO) Market is the dependency on the pulp and paper industry for raw material supply. CTO is a by-product of the Kraft pulping process, meaning its availability is intrinsically tied to the production levels of this industry. Any disruptions in the pulp and paper sector, such as reduced demand for paper products, shifts toward digital alternatives, or operational shutdowns, can directly impact the global supply of CTO.

Additionally, regional disparities in pulp and paper production create supply chain inconsistencies. For example, North America and Europe dominate the pulp and paper industry, leading to a concentrated supply of CTO in these regions. In contrast, developing regions often face limited availability, increasing logistical and transportation costs for importing CTO. Such uneven distribution can restrict the growth potential of the CTO market in emerging economies.

### Key Market Trends

#### Rising Adoption of CTO in Biofuel Production

The growing emphasis on renewable energy sources and reducing carbon footprints has positioned Crude Tall Oil (CTO) as a critical feedstock for biofuel production. CTO is increasingly being used in the production of biodiesel due to its renewable nature, lower emissions, and compatibility with existing diesel engines. With global efforts to transition away from fossil fuels, biofuels derived from CTO are becoming an integral part of sustainable energy strategies. In mid-2024, Ingevity Corporation ended its crude tall oil purchase agreement with GP Pine Chemicals LLC, a Georgia-Pacific subsidiary. This strategic move involved a USD100 million termination fee, marking a notable shift in Ingevity's performance chemicals business strategy.

#### 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:

- o Tall Oil Rosin
- o Tall Oil Fatty Acids
- o Distilled Tall Oil
- o Tall Oil Pitch
- o Others

#### - [ ]Crude Tall Oil Market, By End User:

- o Automotive
- o Chemicals
- o Metalworking
- o Electronics & Electricals

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- o Others

-□Crude Tall Oil Market, By Application:

- o Adhesive

- o Inks & Toners

- o Partings & Coatings

- o Hygiene Products

- o Others

-□Crude Tall Oil Market, By Region:

- o North America

- United States

- Canada

- Mexico

- o Europe

- Germany

- France

- United Kingdom

- Italy

- Spain

- o Asia Pacific

- China

- India

- Japan

- South Korea

- Australia

- o South America

- Brazil

- Colombia

- Argentina

- o Middle East & Africa

- Saudi Arabia

- UAE

- South Africa

- Turkey

- Kuwait

Competitive Landscape

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

Available Customizations:

Global Crude Tall Oil Market report with the given market data, Tech Sci 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).

## Table of Contents:

1. Product Overview

- 1.1. Market Definition

- 1.2. Scope of the Market

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 1.2.1. Markets Covered
- 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations
- 2. Research Methodology
  - 2.1. Objective of the Study
  - 2.2. Baseline Methodology
  - 2.3. Formulation of the Scope
  - 2.4. Assumptions and Limitations
  - 2.5. Sources of Research
    - 2.5.1. Secondary Research
    - 2.5.2. Primary Research
  - 2.6. Approach for the Market Study
    - 2.6.1. The Bottom-Up Approach
    - 2.6.2. The Top-Down Approach
  - 2.7. Methodology Followed for Calculation of Market Size & Market Shares
  - 2.8. Forecasting Methodology
    - 2.8.1. Data Triangulation & Validation
- 3. Executive Summary
  - 3.1. Overview of the Market
  - 3.2. Overview of Key Market Segmentations
  - 3.3. Overview of Key Market Players
  - 3.4. Overview of Key Regions/Countries
  - 3.5. Overview of Market Drivers, Challenges, and Trends
- 4. Voice of Customer
- 5. Global Crude Tall Oil Market Outlook
  - 5.1. Market Size & Forecast
    - 5.1.1. By Value
  - 5.2. Market Share & Forecast
    - 5.2.1. By Product (Tall Oil Rosin, Tall Oil Fatty Acids, Distilled Tall Oil, all Oil Pitch, Others)
    - 5.2.2. By End User (Automotive, Chemicals, Metalworking, Electronics & Electricals, Others)
    - 5.2.3. By Application (Adhesive, Inks & Toners, Partings & Coatings, Hygiene Products, Others)
    - 5.2.4. By Region
  - 5.3. By Company (2024)
  - 5.4. Market Map
- 6. North America Crude Tall Oil Market Outlook
  - 6.1. Market Size & Forecast
    - 6.1.1. By Value
  - 6.2. Market Share & Forecast
    - 6.2.1. By Product
    - 6.2.2. By End User
    - 6.2.3. By Application
    - 6.2.4. By Country
  - 6.3. North America: Country Analysis
    - 6.3.1. United States Crude Tall Oil Market Outlook
      - 6.3.1.1. Market Size & Forecast
        - 6.3.1.1.1. By Value
      - 6.3.1.2. Market Share & Forecast

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 6.3.1.2.1. By Product
- 6.3.1.2.2. By End User
- 6.3.1.2.3. By Application
- 6.3.2. Canada Crude Tall Oil Market Outlook
  - 6.3.2.1. Market Size & Forecast
    - 6.3.2.1.1. By Value
  - 6.3.2.2. Market Share & Forecast
    - 6.3.2.2.1. By Product
    - 6.3.2.2.2. By End User
    - 6.3.2.2.3. By Application
- 6.3.3. Mexico Crude Tall Oil Market Outlook
  - 6.3.3.1. Market Size & Forecast
    - 6.3.3.1.1. By Value
  - 6.3.3.2. Market Share & Forecast
    - 6.3.3.2.1. By Product
    - 6.3.3.2.2. By End User
    - 6.3.3.2.3. By Application
- 7. Europe Crude Tall Oil Market Outlook
  - 7.1. Market Size & Forecast
    - 7.1.1. By Value
  - 7.2. Market Share & Forecast
    - 7.2.1. By Product
    - 7.2.2. By End User
    - 7.2.3. By Application
    - 7.2.4. By Country
  - 7.3. Europe: Country Analysis
    - 7.3.1. Germany Crude Tall Oil Market Outlook
      - 7.3.1.1. Market Size & Forecast
        - 7.3.1.1.1. By Value
      - 7.3.1.2. Market Share & Forecast
        - 7.3.1.2.1. By Product
        - 7.3.1.2.2. By End User
        - 7.3.1.2.3. By Application
    - 7.3.2. United Kingdom Crude Tall Oil Market Outlook
      - 7.3.2.1. Market Size & Forecast
        - 7.3.2.1.1. By Value
      - 7.3.2.2. Market Share & Forecast
        - 7.3.2.2.1. By Product
        - 7.3.2.2.2. By End User
        - 7.3.2.2.3. By Application
    - 7.3.3. Italy Crude Tall Oil Market Outlook
      - 7.3.3.1. Market Size & Forecast
        - 7.3.3.1.1. By Value
      - 7.3.3.2. Market Share & Forecast
        - 7.3.3.2.1. By Product
        - 7.3.3.2.2. By End User
        - 7.3.3.2.3. By Application

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

#### 7.3.4. France Crude Tall Oil Market Outlook

##### 7.3.4.1. Market Size & Forecast

###### 7.3.4.1.1. By Value

##### 7.3.4.2. Market Share & Forecast

###### 7.3.4.2.1. By Product

###### 7.3.4.2.2. By End User

###### 7.3.4.2.3. By Application

#### 7.3.5. Spain Crude Tall Oil Market Outlook

##### 7.3.5.1. Market Size & Forecast

###### 7.3.5.1.1. By Value

##### 7.3.5.2. Market Share & Forecast

###### 7.3.5.2.1. By Product

###### 7.3.5.2.2. By End User

###### 7.3.5.2.3. By Application

#### 8. Asia-Pacific Crude Tall Oil Market Outlook

##### 8.1. Market Size & Forecast

###### 8.1.1. By Value

##### 8.2. Market Share & Forecast

###### 8.2.1. By Product

###### 8.2.2. By End User

###### 8.2.3. By Application

###### 8.2.4. By Country

##### 8.3. Asia-Pacific: Country Analysis

###### 8.3.1. China Crude Tall Oil Market Outlook

###### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

###### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Product

###### 8.3.1.2.2. By End User

###### 8.3.1.2.3. By Application

###### 8.3.2. India Crude Tall Oil Market Outlook

###### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

###### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Product

###### 8.3.2.2.2. By End User

###### 8.3.2.2.3. By Application

###### 8.3.3. Japan Crude Tall Oil Market Outlook

###### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

###### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Product

###### 8.3.3.2.2. By End User

###### 8.3.3.2.3. By Application

###### 8.3.4. South Korea Crude Tall Oil Market Outlook

###### 8.3.4.1. Market Size & Forecast

###### 8.3.4.1.1. By Value

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Product
  - 8.3.4.2.2. By End User
  - 8.3.4.2.3. By Application
- 8.3.5. Australia Crude Tall Oil Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Product
    - 8.3.5.2.2. By End User
    - 8.3.5.2.3. By Application
- 9. South America Crude Tall Oil Market Outlook
  - 9.1. Market Size & Forecast
    - 9.1.1. By Value
  - 9.2. Market Share & Forecast
    - 9.2.1. By Product
    - 9.2.2. By End User
    - 9.2.3. By Application
    - 9.2.4. By Country
  - 9.3. South America: Country Analysis
    - 9.3.1. Brazil Crude Tall Oil Market Outlook
      - 9.3.1.1. Market Size & Forecast
        - 9.3.1.1.1. By Value
      - 9.3.1.2. Market Share & Forecast
        - 9.3.1.2.1. By Product
        - 9.3.1.2.2. By End User
        - 9.3.1.2.3. By Application
    - 9.3.2. Argentina Crude Tall Oil Market Outlook
      - 9.3.2.1. Market Size & Forecast
        - 9.3.2.1.1. By Value
      - 9.3.2.2. Market Share & Forecast
        - 9.3.2.2.1. By Product
        - 9.3.2.2.2. By End User
        - 9.3.2.2.3. By Application
    - 9.3.3. Colombia Crude Tall Oil Market Outlook
      - 9.3.3.1. Market Size & Forecast
        - 9.3.3.1.1. By Value
      - 9.3.3.2. Market Share & Forecast
        - 9.3.3.2.1. By Product
        - 9.3.3.2.2. By End User
        - 9.3.3.2.3. By Application
- 10. Middle East and Africa Crude Tall Oil Market Outlook
  - 10.1. Market Size & Forecast
    - 10.1.1. By Value
  - 10.2. Market Share & Forecast
    - 10.2.1. By Product
    - 10.2.2. By End User

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 10.2.3. By Application
- 10.2.4. By Country
- 10.3. Middle East and Africa: Country Analysis
  - 10.3.1. South Africa Crude Tall Oil Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Product
      - 10.3.1.2.2. By End User
      - 10.3.1.2.3. By Application
  - 10.3.2. Saudi Arabia Crude Tall Oil Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value
    - 10.3.2.2. Market Share & Forecast
      - 10.3.2.2.1. By Product
      - 10.3.2.2.2. By End User
      - 10.3.2.2.3. By Application
  - 10.3.3. UAE Crude Tall Oil Market Outlook
    - 10.3.3.1. Market Size & Forecast
      - 10.3.3.1.1. By Value
    - 10.3.3.2. Market Share & Forecast
      - 10.3.3.2.1. By Product
      - 10.3.3.2.2. By End User
      - 10.3.3.2.3. By Application
  - 10.3.4. Kuwait Crude Tall Oil Market Outlook
    - 10.3.4.1. Market Size & Forecast
      - 10.3.4.1.1. By Value
    - 10.3.4.2. Market Share & Forecast
      - 10.3.4.2.1. By Product
      - 10.3.4.2.2. By End User
      - 10.3.4.2.3. By Application
  - 10.3.5. Turkey Crude Tall Oil Market Outlook
    - 10.3.5.1. Market Size & Forecast
      - 10.3.5.1.1. By Value
    - 10.3.5.2. Market Share & Forecast
      - 10.3.5.2.1. By Product
      - 10.3.5.2.2. By End User
      - 10.3.5.2.3. By Application
- 11. Market Dynamics
  - 11.1. Drivers
  - 11.2. Challenges
- 12. Market Trends & Developments
  - 12.1. Merger & Acquisition (If Any)
  - 12.2. Product Launches (If Any)
  - 12.3. Recent Developments
- 13. Company Profiles
  - 13.1. Kraton Corporation

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)



- 13.1.1. Business Overview
- 13.1.2. Key Revenue and Financials
- 13.1.3. Recent Developments
- 13.1.4. Key Personnel/Key Contact Person
- 13.1.5. Key Product/Services Offered
- 13.2. UPM-Kymmene Corporation
- 13.3. Stora Enso Oyj
- 13.4. Georgia-Pacific LLC
- 13.5. Pine Chemical Group
- 13.6. Foreverest Resources Ltd.
- 13.7. Ingevity Corporation
- 13.8. Segezha Group
- 13.9. Mercer International Inc.
- 13.10. Eastman Chemical Company
- 14. Strategic Recommendations
- 15. About Us & Disclaimer

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**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, By Competition, 2020-2030F**

Market Report | 2025-03-28 | 188 pages | TechSci Research

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4500.00
	Multi-User License	\$5500.00
	Custom Research License	\$8000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-04"/>
		Signature	<input type="text"/>