360iResearch

Tall Oil Fatty Acids Market

Global Forecast 2026-2032

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1. Preface

1.1. Objectives of the Study

- Which suppliers have documented commercial offerings of Low-Rosin TOFA and Higher-Rosin TOFA, and what product and service commitments distinguish those offerings from adjacent tall-oil activities?
- What documentation, qualification requirements and supply commitments do buyers require for each included application, and what must be established before switching TOFA suppliers or grades?
- How do upstream supply relationships and competing outlets affect continuity, bargaining power and sourcing alternatives for TOFA suppliers and buyers?
- Which jurisdiction-specific product obligations, purchasing conditions and sustainability requirements affect TOFA access, and which apply to the exact offering rather than the supplier generally?
- How do Direct Sales, Distributor and Trader Sales, and Agent and Broker Sales allocate customer access, contracting responsibility, product support and supply assurance?
- Which buyer needs and commercial service capabilities distinguish Bulk, Intermediate Bulk Containers, Drums and Jerrycans, and how do delivery-format choices affect sourcing flexibility and inventory exposure?
- When do ISCC EU, ISCC PLUS or Sales Without Certification Transfer differentiate a TOFA transaction, and what evidence is necessary before relying on that distinction in purchasing or positioning?
- Which TOFA and alternative-input options are documented for a buyer's intended use, and how do qualification, service commitments and total purchasing economics affect credible switching choices?

1.2. Market Definition

The Global Tall Oil Fatty Acids market concerns the commercial supply and purchase of Tall Oil Fatty Acids (TOFA), including Low-Rosin TOFA and Higher-Rosin TOFA. Its scope covers the accepted applications and buyer industries through the included delivery formats and sales channels, with ISCC EU, ISCC PLUS and Sales Without Certification Transfer retained as distinct certification-related categories.

The offering boundary remains TOFA. Upstream materials, other tall-oil products, competing inputs and downstream resins, formulated chemicals, finished materials and fuels provide value-chain or substitution context; their separate commercial activity is not automatically part of the TOFA market. TOFA supplied for Fuel Production and Fuel Additives is included, while the resulting fuel business is not thereby included. The geographic boundary is global rather than restricted to the jurisdictions represented by individual businesses or experts.

1.3. Market Segmentation & Coverage

Rosin Acid Content comprises Low-Rosin TOFA and Higher-Rosin TOFA. This axis separates the accepted grade categories for supplier and buyer comparisons without establishing that the grades are interchangeable for a particular application.

Application comprises Resin and Polymer Production; Oleochemical Intermediate Production; Coatings, Inks, Adhesives and Sealants; Lubricants and Metalworking Fluids; Cleaning and Personal Care Products; Oilfield Chemicals; Mineral Processing; Rubber and Plastics Processing; Construction Materials and Chemicals; Paper, Textile and Leather Processing; Agrochemical Formulations; Water Treatment; Fuel Production; and Fuel Additives. This axis identifies the intended commercial use of TOFA rather than the full value of the downstream product.

Buyer Industry comprises Chemical Manufacturers, including Basic Chemical and Oleochemical Manufacturers; Resin and Synthetic Rubber Manufacturers; Coating and Ink Manufacturers; Soap, Detergent and Personal Care Manufacturers; Pesticide and Disinfectant Manufacturers; and Adhesive and Industrial Additive Manufacturers. It also includes Fuel and Lubricant Manufacturers; Oil and Gas Producers and Service Companies; Mining and Mineral Processing Companies; Rubber and Plastics Product Manufacturers; Paper, Textile and Leather Manufacturers; Metal Manufacturers and Fabricators; Construction Material Producers and Contractors; and Water and Wastewater Treatment Operators. This axis identifies the purchasing organization's sector separately from the application of its TOFA purchase.

Delivery Format comprises Bulk, Intermediate Bulk Containers, Drums and Jerrycans. These categories frame comparisons of fulfillment arrangements, buyer inventory responsibilities and commercial service requirements without presuming that every supplier offers every format.

Sales Channel comprises Direct Sales, Distributor and Trader Sales, and Agent and Broker Sales. This axis distinguishes routes to the customer and supports examination of contracting responsibility, representation and service commitments; the category label alone does not establish a particular intermediary's authority.

Sustainability Certification comprises ISCC EU, ISCC PLUS and Sales Without Certification Transfer. This axis concerns the certification-related basis of the commercial offering or transaction. Its categories remain separate from conclusions about jurisdiction-specific legal eligibility or individual buyer acceptance. All six axes are independent analytical views, not additive opportunities.

Table 1. Global Tall Oil Fatty Acids Market Segmentation & Coverage

Segmentation	Coverage
Application	• Resin and Polymer Production • Oleochemical Intermediate Production • Fuel Additives • Lubricants and Metalworking Fluids • Fuel Production • Cleaning and Personal Care Products • Oilfield Chemicals • Construction Materials and Chemicals • Mineral Processing • Coatings, Inks, Adhesives and Sealants • Rubber and Plastics Processing • Agrochemical Formulations • Paper, Textile and Leather Processing • Water Treatment

Buyer Industry	• Chemical Manufacturers
	  o Resin and Synthetic Rubber Manufacturers
	  o Basic Chemical and Oleochemical Manufacturers
	  o Adhesive and Industrial Additive Manufacturers
	  o Coating and Ink Manufacturers
	  o Soap, Detergent and Personal Care Manufacturers
	  o Pesticide and Disinfectant Manufacturers
	• Fuel and Lubricant Manufacturers
	• Mining and Mineral Processing Companies
	• Oil and Gas Producers and Service Companies
	• Rubber and Plastics Product Manufacturers
	• Construction Material Producers and Contractors
	• Paper, Textile and Leather Manufacturers
	• Metal Manufacturers and Fabricators
	• Water and Wastewater Treatment Operators

Delivery Format	• Bulk • Intermediate Bulk Containers • Drums • Jerrycans
Rosin Acid Content	• Low-Rosin TOFA • Higher-Rosin TOFA
Sales Channel	• Direct Sales • Distributor and Trader Sales • Agent and Broker Sales
Sustainability Certification	• Sales Without Certification Transfer • ISCC EU • ISCC PLUS

Evidence: [E906], [E905], [E901], [E903], [E902], [E904], [E912], [E911], [E917], [E913], [E914], [E908], [E916], [E915], [E907], [E910], [E909], [E464], [E469], [E444], [E461], [E458], [E460], [E457], [E456], [E442], [E443], [E446], [E447], [E472], [E471], [E455], [E462], [E468], [E459], [E385], [E387], [E384], [E394], [E392], [E389], [E486], [E485], [E480], [E479], [E482], [E481], [E477], [E475], [E478], [E476], [E352], [E356], [E348], [E354], [E346], [E345], [E351], [E350], [E717], [E715], [E714], [E711], [E710], [E597], [E596], [E593], [E594], [E604], [E603], [E611], [E613], [E323], [E322], [E324], [E325], [E224], [E225], [E705],

[E701], [E702], [E704], [E707], [E706], [E896], [E895], [E202], [E220], [E219], [E211], [E212], [E205], [E213], [E201], [E204], [E579], [E568], [E577], [E581], [E585], [E625], [E377], [E378], [E379], [E383], [E382], [E402], [E398], [E400], [E401], [E399], [E396], [E397], [E404], [E403], [E375], [E167], [E177], [E100], [E99], [E97], [E98], [E665], [E656], [E658], [E548], [E550], [E549], [E620] Taxonomy evidence: Segmentation

1.4. Years Considered for the Study

2024 is the historical year, 2025 is the base year, 2026 is the estimated year, and 2032 is the forecast horizon.

Figure 1. Global Tall Oil Fatty Acids Market, Years Considered for the Study

1.5. Currency Considered for the Study

The reporting currency is the U.S. dollar (USD). Monetary amounts are expressed in absolute USD, without an implied scale multiplier.

1.6. Language Considered for the Study

The study is published in American English.

1.7. Key Stakeholders

- TOFA suppliers and prospective entrants: assess grade coverage, buyer access, documentation and the commercial commitments needed to support an offering.
- Upstream supply-chain participants: evaluate TOFA-related supply relationships and exposure to competing downstream outlets without treating all upstream activity as part of the studied market.

- Chemical Manufacturers: compare grade suitability, supplier qualification and continuity requirements across the included chemical-manufacturing categories.
- Fuel and Lubricant Manufacturers: distinguish TOFA purchasing requirements, certification conditions and supply commitments from the economics of the resulting downstream products.
- Other included industrial buyers and treatment operators: assess application-specific purchasing requirements, switching implications and the division of responsibility between direct suppliers and intermediaries.
- Distributors and traders: evaluate supplier authorization, customer access, fulfillment commitments and the responsibilities attached to representing a TOFA offering.
- Agents and brokers: establish the scope of their commercial role and distinguish transaction facilitation from product ownership, supply assurance or technical support commitments.
- Delivery and logistics providers: assess the service responsibilities associated with the accepted delivery formats and their fit with buyer purchasing arrangements.
- Certification bodies and relevant market authorities: distinguish certification scope, applicable legal requirements and transaction documentation from general sustainability positioning.
- Investors, lenders and strategic acquirers: distinguish documented TOFA participation and business rights from adjacent portfolios, announced initiatives and unverified customer access.

2. Research Methodology

2.1. Introduction

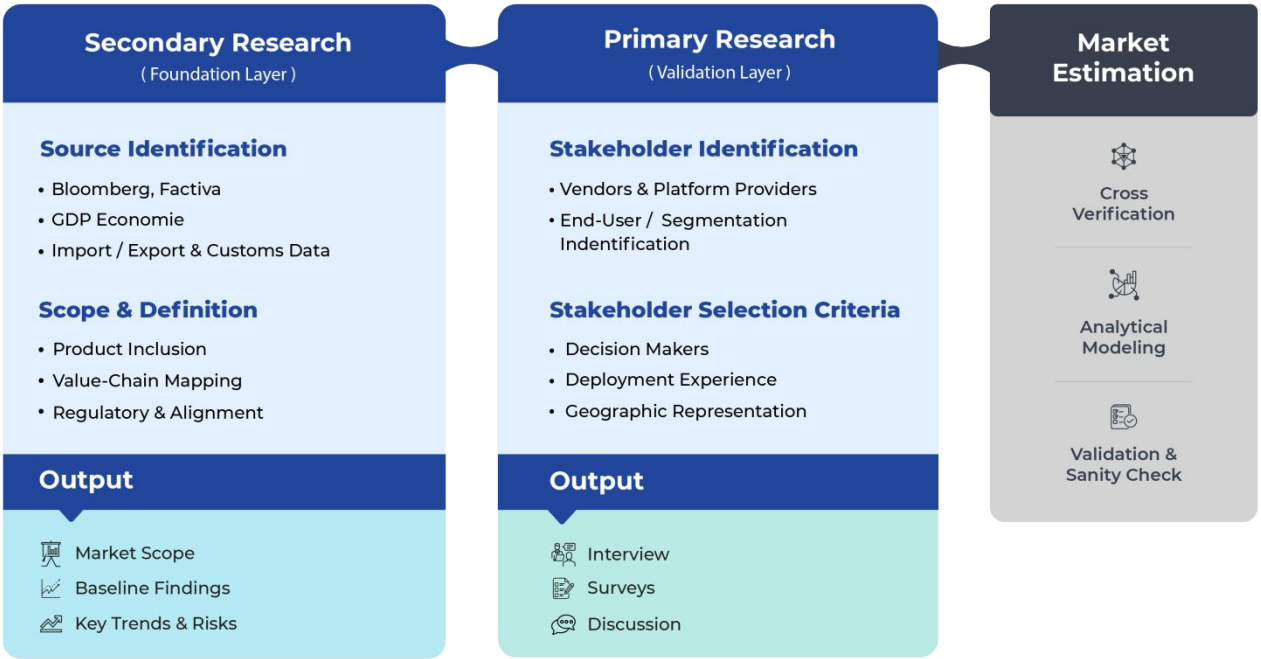
The Tall Oil Fatty Acids study frames decisions about commercial participation, purchasing access and competitive alternatives within the global TOFA offering boundary. Its approach separates documented business conditions from economic interpretation and conditional recommendations. The accepted categories organize the inquiry; they do not, by themselves, establish supplier capability, buyer acceptance or commercial advantage.

2.2. Research Design

The research design centers on an identifiable commercial relationship: who offers Low-Rosin TOFA or Higher-Rosin TOFA, which buyer and application the offering addresses, and what delivery, channel and certification conditions apply. Product claims, legal-entity participation and buyer requirements are separate questions; evidence supporting one does not automatically establish the others.

Coverage follows the global boundary and the study's period roles. A jurisdiction-specific business right or a dated offering statement must retain that scope when used to interpret access, competition or purchasing choices elsewhere.

Figure 2. Global Tall Oil Fatty Acids Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive

interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

2.2.2. Secondary Research

Official product portfolios are appropriate evidence for advertised TOFA grades and commercial formats, but not for customer acceptance. Company filings can support disclosed operations, ownership and business rights within their reporting boundaries. Regulatory records establish legal status in their stated jurisdictions, while buyer policies and public purchasing documents can establish particular access or qualification conditions.

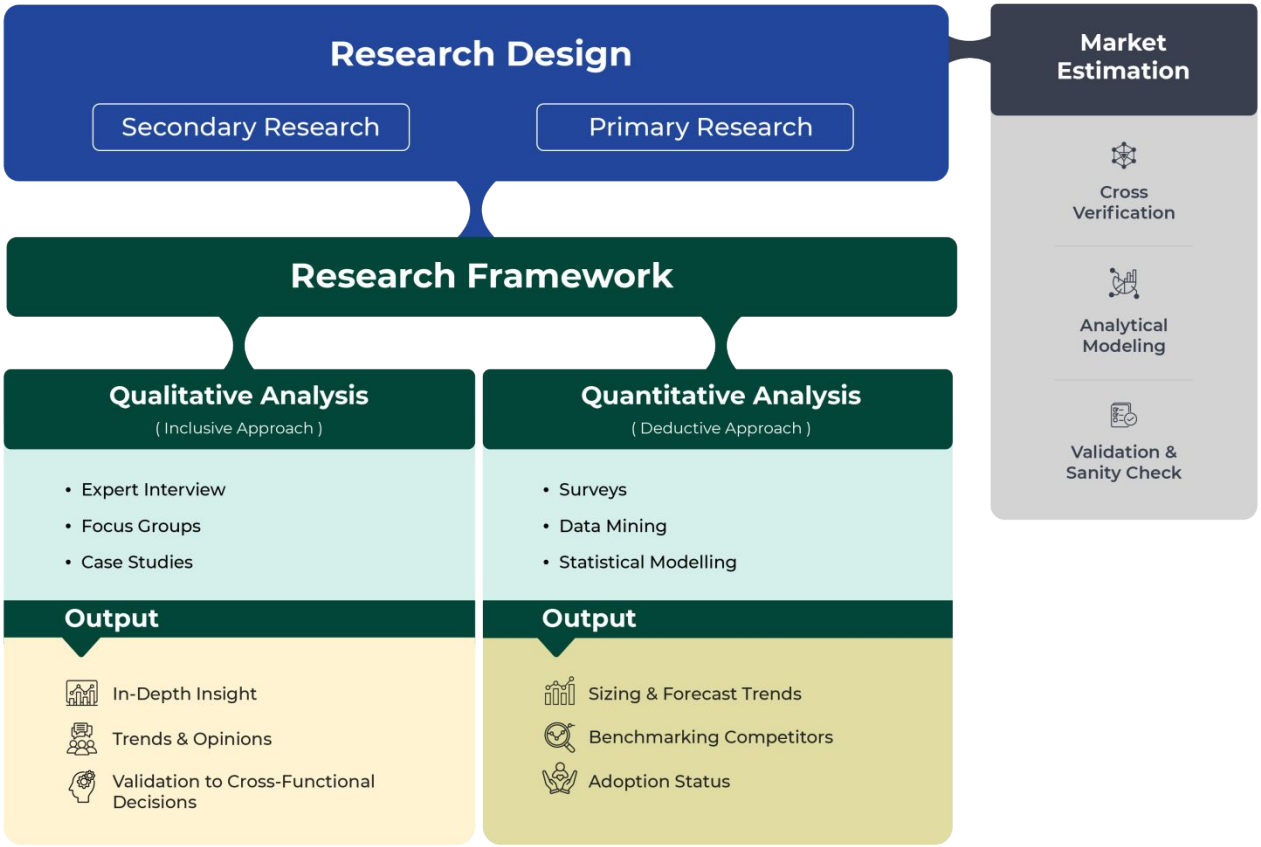
Certification records and official channel statements have narrower roles: they can support the scope of a certificate or a stated commercial relationship, rather than blanket eligibility for every TOFA transaction. Broader chemicals, tall-oil or downstream-industry records provide context unless their boundaries separately identify the studied TOFA activity.

2.3. Research Framework

The framework connects the TOFA offering boundary to Rosin Acid Content, Application, Buyer Industry, Delivery Format, Sales Channel and Sustainability Certification. These lenses organize comparisons among documented offerings, participating businesses and purchasing requirements before interpreting competitive alternatives.

The commercial question is whether an evidenced capability addresses a particular buyer need under the applicable access and delivery conditions. This connection keeps a supplier's wider portfolio, an upstream position or a downstream association from becoming an unsupported conclusion about its TOFA capabilities or attractiveness.

Figure 3. Global Tall Oil Fatty Acids Market, Research Framework



2.3.1. Qualitative Analysis

Qualitative analysis addresses the commercial reasons a buyer might retain or change a TOFA supplier, grade, delivery format or purchasing channel. Relevant questions concern qualification requirements, documentation, supply continuity, customer support, inventory responsibilities and the purchasing significance of certification transfer. These factors are examined as potential sources of differentiation or friction, rather than presumed advantages of any category.

Buyer requirements must remain distinct from supplier claims. A commercially persuasive offering requires an evidenced connection between what the supplier commits to provide and what the purchaser requires for the intended application.

2.3.2. Quantitative Analysis

Quantitative interpretation must use compatible product, entity, geographic and period boundaries, together with absolute USD reporting. The six segmentation axes are independent views of the same TOFA activity, not additive commercial pools. Application and Buyer Industry classifications therefore require distinct attribution logic, while delivery, channel and certification classifications must remain attached to the relevant offering or commercial relationship.

Comparisons must distinguish TOFA-specific business facts from broader corporate or tall-oil disclosures. Differences in reporting scope cannot be resolved merely by assigning the same category label to otherwise incompatible records.

2.4. Market Size Estimation

The estimation perimeter is the commercial TOFA offering, not a supplier's entire business or the full downstream product made with TOFA. Any assessment must maintain a consistent treatment of producer and intermediary activity so that different descriptions of the same supply relationship do not become separate contributions.

Category inclusion establishes analytical coverage. It does not establish an additive contribution, justify attribution from an adjacent business, or settle how a broader disclosure should be assigned to TOFA.

2.4.1. Top-Down Approach

A top-down view can serve as a boundary check only where a broader commercial record supports a defensible TOFA component. Tall-oil, oleochemical, resin or fuel aggregates do not themselves establish that component. Attribution requires evidence compatible with the TOFA product boundary and relevant period; application or certification membership alone is not an allocation key.

2.4.2. Bottom-Up Approach

A bottom-up view can connect documented TOFA business activity to the exact offering and participating entity. Its commercial usefulness depends on distinguishing that activity from a parent company's wider chemicals operations and understanding whether an intermediary represents the same underlying supply relationship. An advertised grade or stated application identifies an offering to examine; it does not independently establish realized business.

2.5. Data Triangulation

Triangulation should distinguish independent corroboration from repetition of the same underlying statement. A product portfolio, legal record and buyer requirement answer different commercial questions; agreement among them is meaningful only where their offering, entity, jurisdiction and period are compatible.

Conflicting descriptions should retain their actual differences rather than be averaged into a stronger claim. Qualitative explanations can help interpret a conflict, but cannot independently establish the numerical proposition or contractual fact in dispute.

Figure 4. Global Tall Oil Fatty Acids Market, Data Triangulation

2.6. Research Outcomes

The study is intended to help suppliers identify the buyer requirements and commercial commitments that need substantiation before extending a TOFA offering, help purchasers compare sourcing relationships beyond grade labels, and help investors distinguish documented participation from announced or adjacent activity. Decision support should explain access conditions, credible alternatives, responsibilities and uncertainties without predetermining a preferred application, sales channel or sustainability position.

2.7. Research Assumptions

- Low-Rosin TOFA and Higher-Rosin TOFA remain distinct study categories. Product comparisons depend on documented grade descriptions and buyer requirements, rather than an assumption that the labels establish interchangeability.
- Application identifies the purpose of a TOFA purchase, while Buyer Industry identifies the purchasing organization's sector. A commercial relationship may require classification under both lenses without becoming two separate market contributions.
- Certification comparisons are conditional on evidence connecting ISCC EU, ISCC PLUS or Sales Without Certification Transfer to the relevant TOFA offering or transaction. A general company statement is not a blanket classification rule.
- Channel comparisons depend on identifying the supplier, intermediary role and allocation of commercial responsibility. A product listing alone is insufficient to infer an intermediary's contractual authority or service commitments.

- Commercial access is assessed for the relevant jurisdiction and period. A local offering, authorization or purchasing condition is not assumed to apply globally or to persist through the forecast horizon.

2.8. Research Limitations

- A disclosure covering a wider chemicals or tall-oil business does not establish its TOFA-specific contribution. Conclusions that depend on product attribution remain limited to the business activity the disclosure actually identifies.
- An advertised TOFA grade does not establish acceptance by a particular purchaser. Switching conclusions remain conditional on the buyer's qualification, documentation and supply requirements.
- Public descriptions of a commercial relationship need not establish its binding terms. Decisions involving exclusivity, supply assurance, channel authority or service obligations require support for those particular commitments.
- Certification-category membership alone does not settle jurisdiction-specific legal eligibility or an individual buyer's purchasing policy. Those access questions require their own applicable records.
- An announced commercial initiative is not equivalent to an available offering. Choices extending through 2032 remain conditional on the initiative's subsequent commercial status and the persistence of the relevant access conditions.

3. Executive Summary

3.1. Introduction

The Global Tall Oil Fatty Acids market is shaped by the combination of an accepted named offering, the organization controlling the raw-material purchase and an accountable supply relationship. Forchem Oyj separates TOFA from neighboring tall-oil products and differentiates FOR2, FOR2X and FOR5; these offerings broaden the shortlist without establishing interchangeability. The upstream resource remains tied to pulp-derived crude tall oil, so a broader product catalog does not itself establish stronger supply assurance.

Commercial access follows purchasing control rather than the breadth of downstream applications. Ingevity Corporation's disclosed TOFA purchases for pavement technologies illustrate why the chemical manufacturer, rather than the contractor using its product, can be the relevant account. Suppliers should establish the ordering entity and accepted grade before pursuing replacement business; buyers should compare material acceptance and binding fulfillment obligations, not renewable-origin claims alone.

Evidence: [E557], [E571], [E805], [E291]

3.2. CXO Perspective

For producer executives, account-development spending should follow a buyer's authority to approve the named material rather than an advertised application alone. allnex's March 2024 Americas purchasing terms illustrate buyer-controlled goods changes and bundled delivery-related obligations, but are not a global TOFA contracting standard. Finance leaders should align upstream and service commitments with the customer's adjustment permissions before accepting fixed obligations. Ingevity's disclosed raw-material cost-recovery risk shows why higher input costs do not automatically become recoverable customer charges; buyer budget certainty can leave the seller carrying the residual exposure.

For investors, refinery ownership needs a different capital case from distribution or representation. The North Charleston arrangements combine licensed rights, reciprocal operating services and environmental indemnities. An asset commitment should therefore depend on defensible feedstock rights, durable customer commitments and explicit liability allocation. Contracted commercial routes preserve flexibility where those foundations are unsettled, but offer less ownership control.

Evidence: [E802], [E20], [E829]

3.3. New Revenue Opportunities

Conditional revenue routes center on conversion-stage TOFA purchasers, fuel-additive buyers assessing Kraton Corporation's SYLFAT 2LT for lubricity-improver applications, and regional fulfillment where an accepted offering solves a service need. Quadra's L5 listing supports a Canada-specific inquiry rather than generalized regional access. Fuel Production remains a separate route: Neste's feedstock capability is not a purchasing commitment. Certification

transfer can support account access when required by the buyer, but is not a separate additive demand opportunity. The Opportunity Mapping section details the purchasing mandates, grade-acceptance conditions and channel alternatives behind these themes.

Evidence: [E817], [E743], [E176], [E782], [E308]

3.4. Next-Generation Business Models

TOFA offers established examples of service-led distribution and producer representation, not a single model suitable for every entrant. Univar Solutions advertises SYLFAT distribution with packaging and regional fulfillment infrastructure. Henry Franc SAS's TOFA-linked agency model leaves delivery and invoicing with producer principals. Distribution is defensible where an authorized intermediary undertakes a service missing from the direct offer; representation fits an account-access contribution that does not require the entrant to become a reseller.

These examples do not establish an available mandate for another entrant. Principal authorization, territorial scope, an accepted named offering and binding responsibilities must precede customer commitments. Resale adds fulfillment and credit responsibilities where agreed, while agency retains dependence on the principal's acceptance and delivery. Producer-direct supply remains preferable when it meets the same purchasing requirements without the additional intermediary relationship.

Evidence: [E881], [E305], [E660], [E671]

3.5. Industry Roadmap

For 2026-2027, the immediate commercial priorities are successor contracting and certified-claim continuity. Mainstream Pine Products, LLC acquired the existing North Charleston refinery on January xx.xx 2026; the transfer does not establish additional physical redundancy. Its current named merchant TOFA offerings and continuing channel authority require separate confirmation before affected renewals. For transactions promising ISCC PLUS transfer, standalone chain-of-custody requirements become mandatory on January xx.xx 2027. Applicable site coverage and documentary responsibilities should be settled across that transition; the rule change does not itself indicate supplier failure.

For 2028-2029, the sourcing milestone is an accepted alternative with demonstrably different origin and contractual exposure. Harima Chemicals Group, Inc.'s disclosed U.S.-to-Japan chain shows why processing location alone cannot establish geographic independence, whereas Forchem Oyj describes Nordic sourcing. Fintoil's mixed FinFA portfolio likewise requires an explicitly identified TOFA offer and an accepted allocation commitment before family-level participation becomes a dependable chemical-buyer supply relationship.

For 2030-2032, deeper commitments should follow durable customer need and resource access. Pulp-linked sourcing and documented fuel outlets warrant attention to allocation commitments, not an assumption of inevitable scarcity. Adjacent fatty-acid alternatives also remain a counterforce where accepted by customers. More reversible customer and channel agreements preserve options while those conditions remain unsettled, at the cost of less control than a defensible ownership arrangement.

Evidence: [E554], [E644], [E890], [E752], [E170], [E69], [E833], [E124]

4. Market Overview

4.1. Introduction

Tall Oil Fatty Acids is an established business-to-business intermediate market connecting pulp-derived raw materials with chemical and fuel-related purchasing. Kraton advertises SYLFAT TOFA, while Forchem presents TOFA separately from Distilled Tall Oil and Tall Oil Rosin. ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■

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Figure 5. Global Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million, Growth %)

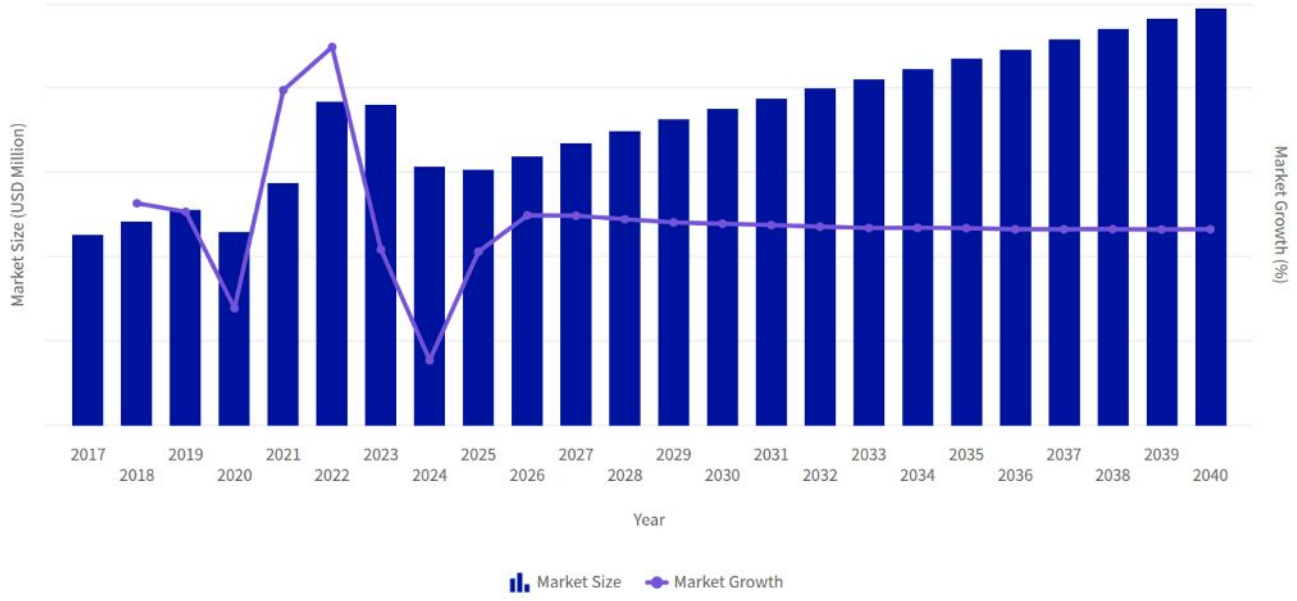

Table 2. Global Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million, Growth %)

Metric	2017	2024	2025	2026	2027	2032	2040
Market Size (USD Million)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Market Growth (%)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Evidence: [E561], [E196]

4.2. Key Growth Contribution

Function-led purchasing provides a defensible TOFA adoption mechanism. Kraton Corporation markets SYLFAT 2LT for diesel-lubricity applications, connecting the material to a specific buyer requirement rather than renewable origin alone. Serving that need requires an accepted named offering and an accountable supply commitment. The supplier's suitability disclaimer preserves purchaser responsibility, so an advertised application supports a commercial inquiry-not automatic approval or displacement of an incumbent.

Figure 6. Global Tall Oil Fatty Acids Market, Key Growth Contribution, by Region, 2025-2032 (USD Million)

Figure 7. Global Tall Oil Fatty Acids Market, Key Growth Contribution, by Country, 2025-2032 (CAGR %)

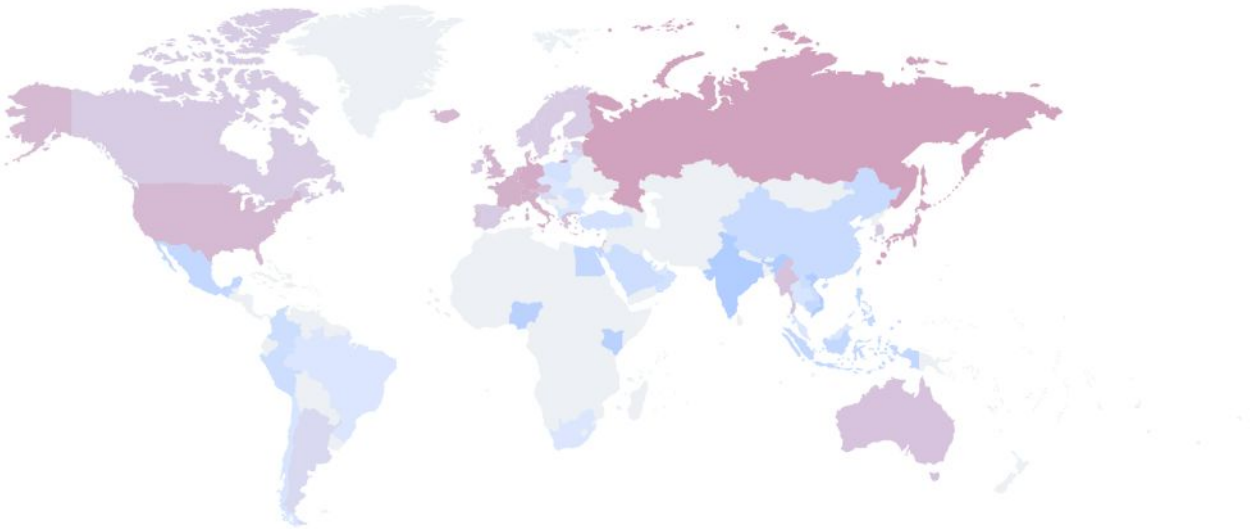

Table 3. Global Tall Oil Fatty Acids Market, Key Growth Contribution, 2025-2032 (USD Million)

Scope	Leading Category	Added Market Size (USD Million)	Growth Share (%)	CAGR (%)
Application	xx.xx	xx.xx	xx.xx	xx.xx
Buyer Industry	xx.xx	xx.xx	xx.xx	xx.xx
Country	xx.xx	xx.xx	xx.xx	xx.xx
Delivery Format	xx.xx	xx.xx	xx.xx	xx.xx
Region	xx.xx	xx.xx	xx.xx	xx.xx
Rosin Acid Content	xx.xx	xx.xx	xx.xx	xx.xx
Sales Channel	xx.xx	xx.xx	xx.xx	xx.xx
Sustainability Certification	xx.xx	xx.xx	xx.xx	xx.xx

Evidence: [E203], [E310]

Evidence: [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E811], [E812], [E819], [E619], [E617], [E621], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E119], [E685], [E684], [E391], [E390], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E811], [E812], [E819], [E342], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E119], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E391], [E390], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

4.3. Industry Ecosystem & Value Chain Analysis

Value creation connects pulp-linked crude tall oil procurement, a portfolio of refined tall-oil products, and downstream conversion or distribution. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Procurement arrangements and the allocation of responsibility between businesses can therefore matter as much as the advertised grade.

Contract duration changes which party carries feedstock uncertainty. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Shorter commitments can preserve purchasing flexibility but do not themselves secure downstream delivery obligations; buyers and refiners must reconcile the commitments on both sides of their business.

Asset ownership and services can also be separated. Ingevity's September 2025 Mainstream transaction announcement contemplated distinct supply, toll-manufacturing and

operating-service agreements. ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪

Evidence: [E566], [E284], [E158]

4.3.1. Supply-Side Analysis

Supply geography should be assessed through the underlying sourcing chain, not simply the seller's location. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Independent sourcing commitments matter more than the number of geographic labels attached to vendors.

Ownership changes also require careful supplier mapping. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Buyers need the post-transfer contracting entity and delivery responsibility confirmed rather than treating legacy and successor names as separate physical sources.

Evidence: [E553], [E808], [E642]

4.3.2. Demand-Side Analysis

▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ Accordingly, a supplier approaching Coating and Ink Manufacturers must determine whether the account purchases TOFA itself or purchases a resin containing it. The same distinction prevents downstream application activity from being mistaken for a direct raw-material purchasing relationship.

Grade acceptance is application-specific. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪ ▪ ▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ Higher-Rosin TOFA therefore should not be treated as automatically outside TOFA, or as an automatic replacement for Low-Rosin TOFA.

Purchasing can involve more than material suitability. allnex's 2021 procurement disclosure included supplier approval, commercial and service evaluation, and environmental and social criteria. ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪

Evidence: [E572], [E605], [E4], [E8]

4.3.3. Stakeholder Analysis

The stakeholder controlling origin information need not be the party selling the final TOFA offering. ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■ ■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ A buyer needs the relevant commercial and documentary responsibilities identified across that chain.

Certification systems serve different purchasing contexts. ■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■ ■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ISCC EU, ISCC PLUS and Sales Without Certification Transfer should consequently remain distinct transaction descriptions rather than a hierarchy that automatically determines product quality or buyer acceptance.

Evidence: [E649], [E64]

4.4. Market Dynamics

Fuel-related purchasing creates two different commercial mechanisms. ■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■ ■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ That establishes a potential competing outlet, not an actual TOFA purchase commitment or a preferred allocation.

The resulting effect on chemical buyers is conditional. If fuel customers secure material also sought by chemical customers, refiners face competing contractual outlets; chemical buyers may need stronger delivery commitments rather than relying on a supplier's renewable-material positioning. ■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■ ■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■

Evidence: [E742]

4.4.1. Key Drivers

4.4.1.1. Named downstream resin portfolios establish a purchasing route

■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■ ■ ■■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■■■■■■ These records establish a named downstream commercial role rather than only a potential research application. They support targeting the resin manufacturer's purchasing relationship, but do not establish its supplier, purchasing commitments or local product availability.

Evidence: [E3], [E5] Named downstream resin portfolios establish a purchasing route

4.4.1.2. Fuel-additive functionality supports a distinct demand mechanism

Kraton markets SYLFAT TOFA for restoring lubricity in ultra-low-sulfur diesel and describes differentiated low-temperature handling characteristics. This provides a performance-led purchasing rationale distinct from using TOFA as a fuel-production feedstock. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪

Evidence: [E190] Fuel-additive functionality supports a distinct demand mechanism

4.4.1.3. Distribution services broaden reachable purchasing settings

Univar advertises SYLFAT distribution alongside bulk, packaging and regional delivery infrastructure. ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Its exclusivity statement does not establish worldwide territorial rights; the relevant geography, seller authority and delivery obligations must be confirmed before relying on that channel.

Evidence: [E875] Distribution services broaden reachable purchasing settings

4.4.2. Key Restraints

4.4.2.1. Pulp-linked feedstock and competing outlets constrain supply flexibility

▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ Chemical demand therefore competes within a wider set of upstream commercial relationships. Buyers should examine feedstock exposure and supply commitments rather than infer security from a TOFA product listing.

Evidence: [E560], [E891] Pulp-linked feedstock and competing outlets constrain supply flexibility

4.4.2.2. Accepted oleochemical alternatives limit bargaining freedom

Oleon's NOURACID SE xx.xx is a soybean-oil fatty-acid offering for alkyd resins and paints. Such adjacent inputs can constrain a TOFA seller's bargaining position where the customer accepts an alternative. ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Evidence: [E753] Accepted oleochemical alternatives limit bargaining freedom

4.4.2.3. Chemical compliance narrows the accessible supplier set

EU chemical-market access carries registration, supply-chain information and covered-use obligations where applicable. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ Sustainability certification is a separate purchasing attribute and does not establish REACH coverage for a proposed TOFA transaction.

Evidence: [E106] Chemical compliance narrows the accessible supplier set

4.4.3. Key Opportunities

4.4.3.1. Grade-specific access to conversion-stage purchasing accounts

[redacted] allnex's documented TOFA-based alkyd and Forchem Oyj's differentiated grades support this route. Capture depends on a verified raw-material purchasing mandate and purchaser acceptance; a downstream coating application alone does not establish either.

Evidence: [E573], [E24] Grade-specific access to conversion-stage purchasing accounts

4.4.3.2. Contracted fulfillment for accepted packaged TOFA

A distributor can address an unmet delivery-format or regional-service requirement attached to an accepted TOFA grade. [redacted] The opening exists only where the intermediary's authorized, binding service closes a gap in the direct offer; another seller is not automatically another production source.

Evidence: [E882], [E295] Contracted fulfillment for accepted packaged TOFA

4.4.3.3. Documentary continuity for certification-linked purchases

Buyers expressly requiring certification transfer create an opening for transaction-ready TOFA supply with the appropriate scheme and chain documentation. ISCC EU and ISCC PLUS serve different purchasing contexts. [redacted]

Evidence: [E62], [E172] Documentary continuity for certification-linked purchases

4.4.4. Key Challenges

4.4.4.1. Matching delivery format with an accountable service commitment

[redacted] Buyers must secure the named format, delivery point and responsible seller in the purchase agreement. Jerrycans remains an included category, but a product listing alone does not establish a particular supplier's fulfillment commitment.

Evidence: [E299] Matching delivery format with an accountable service commitment

4.4.4.2. Maintaining contractual clarity through supplier ownership changes

The completed Mainstream acquisition changes the ownership behind the North Charleston refinery business. [redacted] The transaction does not by itself establish either a service interruption or uninterrupted fulfillment.

Evidence: [E159], [E816] Maintaining contractual clarity through supplier ownership changes

4.4.4.3. Preserving certification transfer through the chain and rule transition

ISCC PLUS requires certification across relevant supply-chain elements, so a producer's certificate alone does not settle a customer's claim-transfer needs. ■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ Sales Without Certification Transfer remains distinct and cannot substitute for an expressly required certified claim.

Evidence: [E171], [E68] Preserving certification transfer through the chain and rule transition

4.5. Porter’s Five Forces Analysis

Competition is differentiated by grade, customer acceptance and fulfillment responsibility rather than supplier name alone. Kraton and Forchem advertise distinct TOFA offerings, establishing commercial alternatives without establishing interchangeability. ■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■

Substitution extends beyond other TOFA brands. Oleon markets NOURACID SE xx.xx a soybean-oil fatty acid, for alkyd resins and architectural and decorative paints. ■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■

Entry barriers differ by business model. Univar's advertised TOFA distribution infrastructure demonstrates that customer access and packaging services can be separated from refinery ownership. ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■

Evidence: [E200], [E583], [E285], [E818], [E874], [E755]

4.6. PESTLE Analysis

European chemical-sector conditions can counteract the appeal of renewable feedstocks. The European Commission's July 2025 Chemicals Industry Action Plan identifies high energy costs, weak demand and geopolitical pressures as competitiveness problems. ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■

[redacted]

Chemical-market access and sustainability claims require separate documentation. [redacted] Environmental and social sourcing expectations can also enter purchasing through supplier-conduct requirements, as illustrated by allnex's disclosed procurement framework.

Trade and intellectual-property exposure remain transaction-specific. [redacted] Purchasing TOFA therefore should not be treated as a blanket patent license for downstream commercial activity; relevant rights depend on the intended business and jurisdiction.

Evidence: [E612], [E7], [E107], [E318]

4.7. Market Outlook

The TOFA outlook depends on converting application-specific propositions into approved purchasing relationships. [redacted] The relevant turning points are accepted orders, renewed mandates and binding service commitments rather than renewable-origin positioning alone.

Customer economics can counteract that proposition. The European Commission's July 2025 chemicals action plan identifies energy and feedstock pressure alongside weak sector demand; those conditions cannot be assigned uniformly to TOFA accounts. [redacted]

Evidence: [E584], [E317]

4.7.1. Near-Term Market Outlook (0-2 Years)

[redacted] Before renewing a legacy relationship, customers should obtain the responsible seller's named offer and confirm continuing delivery and claims obligations. The successor's current merchant offering and

channel authority remain unresolved by the asset-transfer record; succession should not be treated as an assured replacement offer.

[redacted] The observable milestones are valid delivery-period coverage and accepted transition arrangements. Sales Without Certification Transfer remains an alternative only where the buyer accepts that different transaction basis.

Evidence: [E169], [E69], [E826]

4.7.2. Medium-Term Market Outlook (3-5 Years)

For 2028-2029, the useful sourcing milestone is an accepted alternative with demonstrably different exposure, not another regional supplier address. Harima Chemicals Group, Inc. documents U.S. crude tall oil procurement supporting Japanese activities, while Forchem Oyj describes a Nordic sourcing foundation. [redacted]

[redacted] Supplier-issued offering identification, accepted orders and renewed commercial mandates would support greater reliance. Continued ambiguity would favor retaining the existing accepted source while evaluating the alternative, rather than presuming deliverable additional supply.

Evidence: [E555], [E645], [E125], [E118]

4.7.3. Long-Term Market Outlook (5-10 Years)

For 2030-2032, the structural question is whether TOFA continues to justify its place in accepted customer offerings while competing for a pulp-linked resource. Forchem Oyj documents that upstream connection, and UPM documents a fuel outlet supported partly by its own pulp mills. [redacted]

Accepted alternatives remain a counterforce. [redacted]

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[redacted] Where those foundations are unsettled, renewable customer and channel contracts preserve options, albeit with less control than a supported ownership route.

Evidence: [E559], [E892], [E754], [E831]

4.8. Go-to-Market Strategy

Producers should enter an account through the entity controlling the TOFA order, with a proposition tied to its approved material and purchasing need. [redacted] An application user without raw-material purchasing authority is an influence contact, not automatically the contracting prospect.

A commercial entrant should choose its role according to the gap it can contractually close. Univar Solutions illustrates distribution with packaging and regional delivery services; that route is defensible where a principal grants the relevant mandate and the customer needs those services. [redacted]

[redacted] Great Britain retains separate UK REACH roles, while applicable U.S. import certification belongs to the importer or its authorized agent. Identify the responsible entity and coverage rather than treating a distributor appointment or sustainability certificate as chemical-market access.

[redacted] The contrasting dated allnex Americas and Univar Solutions SAS French terms illustrate why contractual alignment matters. Commit after the principal, buyer and service obligations are compatible; narrow the offer or defer where an essential obligation remains unsupported.

Evidence: [E562], [E873], [E105], [E306], [E19], [E81], [E680], [E535], [E663], [E653]

5. Market Insights

5.1. Consumer Insights & End-User Perspective

The direct TOFA buyer can be an industrial chemical manufacturer rather than the ultimate user of its finished product. Ingevity's 2025 filing identifies TOFA among purchased raw materials and connects its availability with the pavement technologies business. ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

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Evidence: [E804], [E290], [E10]

5.2. Consumer Experience Benchmarking

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Higher-Rosin TOFA must remain visible rather than be judged as an unsuccessful version of a low-rosin offering. Forchem presents FOR5 as TOFA with a distinct fatty-acid and rosin-acid balance, while FOR2X adds advertised low-temperature differentiation. ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪

Evidence: [E574], [E296]

5.3. Opportunity Mapping

Conversion-stage accounts merit focused prospecting because their raw-material role is better evidenced than a downstream application alone. [redacted] Approaching contractors or finished-coating users directly is less defensible where they purchase prepared chemicals rather than TOFA.

Offering fit determines whether those accounts are commercially contestable. [redacted] An incumbent retains an advantage where a proposed replacement lacks approval, even when its application description overlaps.

Fuel Additives offers a function-led route: Kraton Corporation positions SYLFAT 2LT for diesel lubricity, while its commercial disclaimer preserves purchaser responsibility for suitability. [redacted] Neste's ability to use crude-tall-oil-based fatty acids warrants a feedstock inquiry, but its wider raw-material portfolio and the absence of a transaction-specific commitment prevent treating that capability as secured demand.

Regional fulfillment is attractive only where a product-specific route closes an actual service gap. Quadra's L5 catalog names Fujian Shaxian SongChuan Chemical, specifies Canada and lists bulk, drum and tote packaging. [redacted]

[redacted] Documentary expenditure is poorly justified when the buyer neither requires nor accepts the proposed claim. Across these routes, qualitative priority follows a verified purchasing role, an accepted offering and a contractible service need, not the breadth of an application catalog.

Evidence: [E567], [E806], [E741], [E756], [E65], [E174], [E216], [E23], [E781], [E309]

5.4. Distribution Channel Analysis

Channel selection should follow the buyer's fulfillment gap. Univar advertises SYLFAT distribution with bulk and packaging infrastructure and regional fleet services, supporting a distributor route when those services meet requirements not covered by a proposed direct offer. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Kraton's September 2025 SYLFAT xx.xx documentation lists Bulk, Intermediate Bulk Containers and Drums subject to availability, not a destination-specific Jerrycans commitment. Buyers should secure the format, receiving location and accountable seller in the accepted order. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Evidence: [E880], [E304]

5.5. Pricing Trend Analysis

TOFA commercial comparisons must normalize contractual cost allocation before drawing conclusions from competing offers. allnex's March 2024 Americas purchasing terms generally include transport, packaging and duties and require written buyer consent for changes. ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

Input pressure does not guarantee downstream cost recovery. Ingevity's 2025 filing identifies TOFA procurement and inability to pass increased raw-material costs to customers as business risks. ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

Evidence: [E822], [E316], [E18], [E80]

5.6. Regulatory Compliance & Standards Framework

EU access for TOFA should not be reduced to a blanket registration demand. ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ This approach avoids both rejecting a legitimately exempt offering and accepting an unsupported blanket exemption claim.

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Material access and downstream intellectual-property rights are separate questions. Forchem's April 2026 FOR5 documentation assigns responsibility for respecting third-party rights in the buyer's activities to the buyer. ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

Evidence: [E602], [E104], [E544], [E683], [E536]

5.7. ESG & Sustainability Analysis

Renewable origin is not a complete ESG purchasing proposition for TOFA. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ A TOFA label alone does not establish a comparative carbon advantage.

Social and governance requirements can independently affect supplier continuity. allnex's 2023 Supplier Code addresses worker rights, environmental compliance, business records and confidential information, and reserves termination rights where compliance cannot be demonstrated. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

Certification-linked purchasing adds a chain-of-custody condition. [redacted] Sales Without Certification Transfer remains a distinct route where the buyer does not require that claim, not a substitute for a promised certified transaction.

Evidence: [E63], [E173], [E67], [E590], [E96], [E6]

5.8. Disruption & Risk Scenarios

Successor-service scenario: the North Charleston transfer is completed, but a rejected renewal, changed order counterparty or unresolved service responsibility could disrupt an affected customer's commercial continuity. [redacted] Ownership change alone demonstrates neither interruption nor additional physical redundancy.

Certified-claim scenario: missing required site coverage or incompatible documentation across the January xx.xx 2027 ISCC PLUS transition could prevent a seller from fulfilling a promised claim even if material remains deliverable. The exposed parties are buyers whose downstream commitments require certification transfer and intermediaries making that promise. [redacted]

[redacted] Supplier allocation notices, changed sourcing commitments and documented origin overlap are more meaningful indicators than general fuel-policy enthusiasm. Buyers should seek enforceable allocation terms and independently supported alternatives rather than count additional seller names.

Customer-budget scenario: if the energy-cost and weak-demand pressures identified in the European Commission's July 2025 action plan persist in an exposed customer's business, requests for cost recovery may encounter resistance while delivery obligations remain binding. [redacted]

[redacted] The scenario does not establish equivalent conditions across all TOFA applications or regions.

Evidence: [E889], [E744], [E168], [E70], [E320], [E830]

5.9. Return on Investment & Cost-Benefit Analysis

For a TOFA purchaser, a distributor-service commitment can justify expenditure when it resolves a receiving-format, delivery or documentation requirement that the proposed direct offer does not meet. [redacted] Where direct supply meets the same obligations, the incremental case for intermediation weakens.

[redacted] Resale may provide greater control over the customer offer while adding any agreed inventory, receivables, packaging and delivery exposure. Neither model is justified without a principal mandate and customers that value its contribution.

Contract alignment can determine whether those benefits are retained. allnex's March 2024 Americas purchasing terms generally bundle delivery-related obligations and constrain changes, whereas Univar Solutions SAS's October 2019 French terms provide a different allocation and a cost-hardship renegotiation route. [redacted]

[redacted] An investor should establish durable feedstock rights, customer commitments, service dependencies and liability allocation before treating an asset route as preferable to contracted supply or distribution. Deferral preserves flexibility where those commercial foundations remain unsettled; it also forgoes the control that a suitably supported ownership arrangement could provide.

Evidence: [E821], [E867], [E293], [E14], [E79], [E666], [E655], [E827]

6. Cumulative Impact of Artificial Intelligence 2026

[redacted] These records establish company initiatives, not TOFA-specific deployment, customer adoption or improved fulfillment. They nevertheless show a potential shift in how buyers discover offerings and reach commercial support.

A controlled TOFA implementation could assist retrieval of approved product documents and route inquiries to the accountable seller. [redacted] The commercial test is accurate information reaching an authorized decision-maker, not chatbot availability alone; TOFA-specific outcomes remain unestablished.

Evidence: [E872], [E862], [E501], [E235]

7. Tall Oil Fatty Acids Market, by Rosin Acid Content

Low-Rosin TOFA and Higher-Rosin TOFA create different supplier shortlists, but not a universal quality hierarchy. ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ The overlap in alkyd applications is important: the application name alone does not determine the appropriate rosin category or establish interchangeability.

The purchasing distinction should therefore be the approved grade and contractual specification, rather than the broad TOFA label. ■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■ ■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ Rosin category does not capture every commercially relevant grade difference, and an alternative is useful only when the buyer accepts its complete offering and delivery commitment.

Figure 8. Global Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2025 (%)

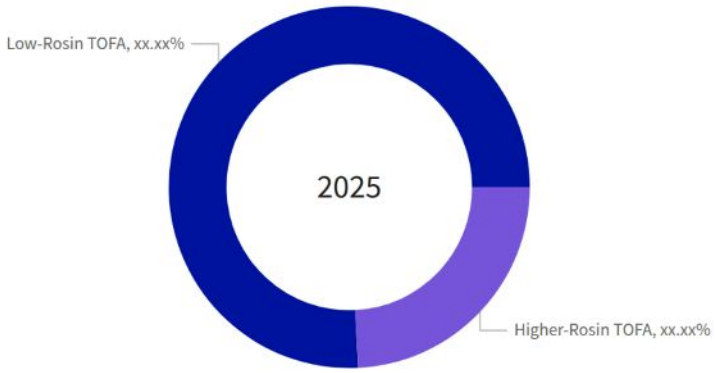

Figure 9. Global Tall Oil Fatty Acids Market, by Rosin Acid Content, 2032 (USD Million)

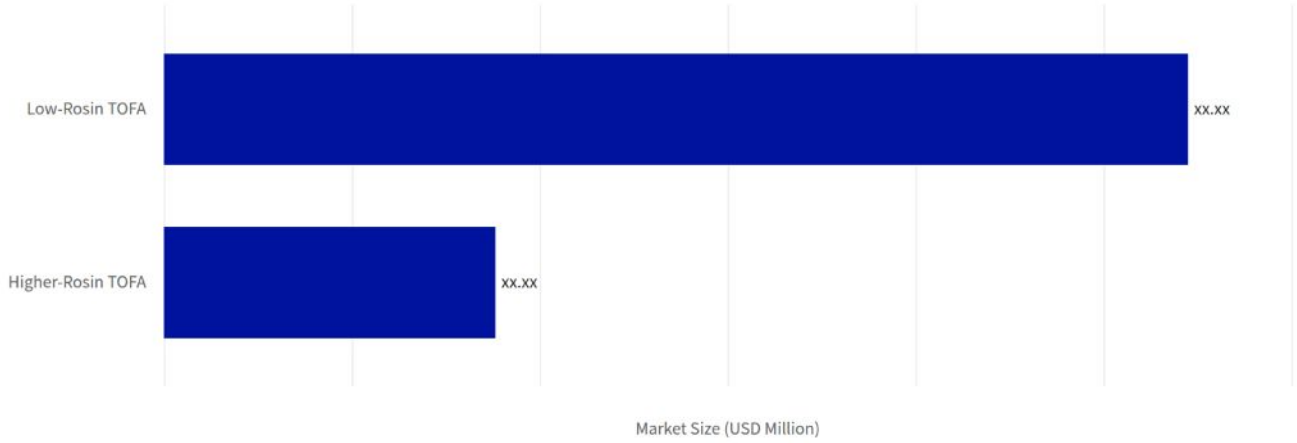

Table 4. Global Tall Oil Fatty Acids Market, by Rosin Acid Content growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 5. Global Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E582], [E600], [E294], [E595] Rosin Acid Content

Evidence: [E601], [E300], [E598], [E626], [E627], [E132], [E131], [E343], [E344] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E601], [E300], [E598], [E626], [E627], [E132], [E131], [E343], [E344], [E337], [E336] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E597], [E596], [E906], [E905], [E912], [E911], [E896] Taxonomy evidence: Segmentation

7.1. Low-Rosin TOFA

Table 6. Global Tall Oil Fatty Acids Market Size, by Low-Rosin TOFA, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 7. Global Tall Oil Fatty Acids Market Size, by Low-Rosin TOFA, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 8. Global Tall Oil Fatty Acids Market Size, by Low-Rosin TOFA, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E901], [E903], [E593], [E594], [E202] Taxonomy evidence: Segmentation

Evidence: [E598], [E626], [E300], [E343] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E598], [E626], [E300], [E343], [E337] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

7.2. Higher-Rosin TOFA

Table 9. Global Tall Oil Fatty Acids Market Size, by Higher-Rosin TOFA, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 10. Global Tall Oil Fatty Acids Market Size, by Higher-Rosin TOFA, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 11. Global Tall Oil Fatty Acids Market Size, by Higher-Rosin TOFA, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E902], [E904], [E604], [E603], [E895], [E220] Taxonomy evidence: Segmentation

Evidence: [E601], [E627], [E132], [E131], [E344] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E601], [E627], [E132], [E131], [E344], [E336] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8. Tall Oil Fatty Acids Market, by Application

▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ This documents a route through a resin manufacturer; it does not make every purchaser of the resulting resin a direct TOFA customer. Suppliers should establish whether the proposed sale concerns TOFA or a downstream intermediate before treating adjacent applications as separate commercial opportunities.

Lubricants and Metalworking Fluids, Cleaning and Personal Care Products, and Oilfield Chemicals require application-specific purchasing propositions rather than renewable-origin positioning alone. FOR5 is advertised across metalworking, oilfield, soap and cleaner applications, while Canada's 2020 assessment records TOFA uses in personal care. ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ The same guide covers other pine-chemical product families, so a broad mining, rubber or construction claim must not be attributed indiscriminately to TOFA. The commercial option is to match the named TOFA offering to the customer's purchasing requirement; an adjacent tall-oil product remains a separate comparison.

▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Water Treatment is also a reported use, without an identified purchasing establishment. These included applications require an identifiable raw-material purchasing relationship before a supplier commits account-development resources; historical use records alone do not establish a current contract.

▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Neste's broader raw-material portfolio is a counterforce to assuming unavoidable competition for TOFA. Sellers should distinguish an additive approval from a documented fuel-feedstock sourcing commitment when assessing these routes.

Figure 10. Global Tall Oil Fatty Acids Market Size, by Application, 2025 (%)

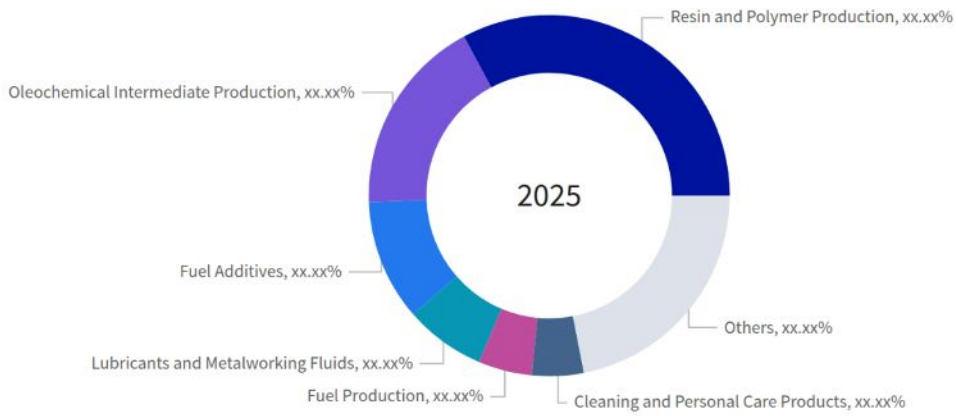

Figure 11. Global Tall Oil Fatty Acids Market, by Application, 2032 (USD Million)

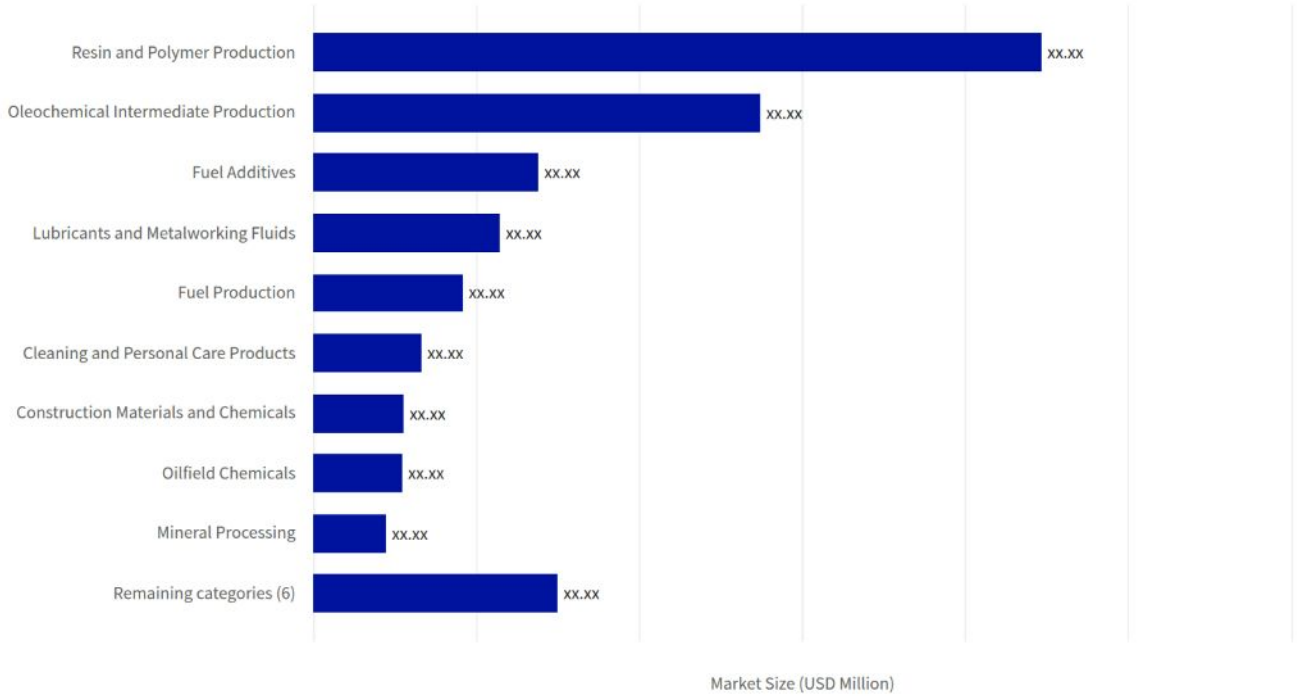

Table 12. Global Tall Oil Fatty Acids Market, by Application growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 13. Global Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E570], [E610], [E740], [E188], [E215], [E463], [E25] Application

Evidence: [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E795], [E796], [E794], [E797], [E811], [E119], [E685], [E684] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E576], [E586], [E587], [E578], [E588], [E739], [E811], [E119], [E342], [E685], [E684], [E686], [E687], [E321], [E315], [E319] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E464], [E469], [E917], [E913] Taxonomy evidence: Segmentation

8.1. Resin and Polymer Production

Table 14. Global Tall Oil Fatty Acids Market Size, by Resin and Polymer Production, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 15. Global Tall Oil Fatty Acids Market Size, by Resin and Polymer Production, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 16. Global Tall Oil Fatty Acids Market Size, by Resin and Polymer Production, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E914], [E908], [E219], [E579] Taxonomy evidence: Segmentation

Evidence: [E209], [E576], [E795] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E576], [E321] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.2. Oleochemical Intermediate Production

Table 17. Global Tall Oil Fatty Acids Market Size, by Oleochemical Intermediate Production, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 18. Global Tall Oil Fatty Acids Market Size, by Oleochemical Intermediate Production, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 19. Global Tall Oil Fatty Acids Market Size, by Oleochemical Intermediate Production, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E568], [E625] Taxonomy evidence: Segmentation

Evidence: [E586], [E796] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E586], [E319] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.3. Fuel Additives

Table 20. Global Tall Oil Fatty Acids Market Size, by Fuel Additives, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 21. Global Tall Oil Fatty Acids Market Size, by Fuel Additives, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 22. Global Tall Oil Fatty Acids Market Size, by Fuel Additives, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E204], [E585] Taxonomy evidence: Segmentation

Evidence: [E217], [E797], [E684] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E684], [E687] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

8.4. Lubricants and Metalworking Fluids

Table 23. Global Tall Oil Fatty Acids Market Size, by Lubricants and Metalworking Fluids, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 24. Global Tall Oil Fatty Acids Market Size, by Lubricants and Metalworking Fluids, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 25. Global Tall Oil Fatty Acids Market Size, by Lubricants and Metalworking Fluids, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E916], [E915], [E459], [E577] Taxonomy evidence: Segmentation

Evidence: [E587] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E587] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.5. Fuel Production

Table 26. Global Tall Oil Fatty Acids Market Size, by Fuel Production, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 27. Global Tall Oil Fatty Acids Market Size, by Fuel Production, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 28. Global Tall Oil Fatty Acids Market Size, by Fuel Production, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E468], [E323], [E322] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E342], [E119], [E739] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E794], [E119] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

8.6. Cleaning and Personal Care Products

Table 29. Global Tall Oil Fatty Acids Market Size, by Cleaning and Personal Care Products, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 30. Global Tall Oil Fatty Acids Market Size, by Cleaning and Personal Care Products, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 31. Global Tall Oil Fatty Acids Market Size, by Cleaning and Personal Care Products, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E910], [E458], [E460] Taxonomy evidence: Segmentation

Evidence: [E449], [E588] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E588] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

8.7. Oilfield Chemicals

Table 32. Global Tall Oil Fatty Acids Market Size, by Oilfield Chemicals, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 33. Global Tall Oil Fatty Acids Market Size, by Oilfield Chemicals, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 34. Global Tall Oil Fatty Acids Market Size, by Oilfield Chemicals, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E457], [E456], [E581] Taxonomy evidence: Segmentation

Evidence: [E578], [E685] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E578], [E685], [E686] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.8. Construction Materials and Chemicals

Table 35. Global Tall Oil Fatty Acids Market Size, by Construction Materials and Chemicals, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 36. Global Tall Oil Fatty Acids Market Size, by Construction Materials and Chemicals, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 37. Global Tall Oil Fatty Acids Market Size, by Construction Materials and Chemicals, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E442], [E443], [E205] Taxonomy evidence: Segmentation

Evidence: [E218], [E811] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E811] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.9. Mineral Processing

Table 38. Global Tall Oil Fatty Acids Market Size, by Mineral Processing, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 39. Global Tall Oil Fatty Acids Market Size, by Mineral Processing, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 40. Global Tall Oil Fatty Acids Market Size, by Mineral Processing, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E211] Taxonomy evidence: Segmentation

Evidence: [E210] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.10. Coatings, Inks, Adhesives and Sealants

Table 41. Global Tall Oil Fatty Acids Market Size, by Coatings, Inks, Adhesives and Sealants, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 42. Global Tall Oil Fatty Acids Market Size, by Coatings, Inks, Adhesives and Sealants, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 43. Global Tall Oil Fatty Acids Market Size, by Coatings, Inks, Adhesives and Sealants, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E907], [E444], [E461] Taxonomy evidence: Segmentation

Evidence: [E445], [E206] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E315] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

8.11. Rubber and Plastics Processing

Table 44. Global Tall Oil Fatty Acids Market Size, by Rubber and Plastics Processing, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 45. Global Tall Oil Fatty Acids Market Size, by Rubber and Plastics Processing, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 46. Global Tall Oil Fatty Acids Market Size, by Rubber and Plastics Processing, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E909], [E212] Taxonomy evidence: Segmentation

Evidence: [E207] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.12. Agrochemical Formulations

Table 47. Global Tall Oil Fatty Acids Market Size, by Agrochemical Formulations, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 48. Global Tall Oil Fatty Acids Market Size, by Agrochemical Formulations, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 49. Global Tall Oil Fatty Acids Market Size, by Agrochemical Formulations, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E455], [E462], [E201] Taxonomy evidence: Segmentation

Evidence: [E467], [E214] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.13. Paper, Textile and Leather Processing

Table 50. Global Tall Oil Fatty Acids Market Size, by Paper, Textile and Leather Processing, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 51. Global Tall Oil Fatty Acids Market Size, by Paper, Textile and Leather Processing, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 52. Global Tall Oil Fatty Acids Market Size, by Paper, Textile and Leather Processing, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E446], [E447], [E213] Taxonomy evidence: Segmentation

Evidence: [E466], [E208] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

8.14. Water Treatment

Table 53. Global Tall Oil Fatty Acids Market Size, by Water Treatment, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 54. Global Tall Oil Fatty Acids Market Size, by Water Treatment, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 55. Global Tall Oil Fatty Acids Market Size, by Water Treatment, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E472], [E471] Taxonomy evidence: Segmentation

Evidence: [E470] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9. Tall Oil Fatty Acids Market, by Buyer Industry

Buyer Industry should follow the organization making the TOFA purchase, not automatically the sector using its finished product. [redacted] Suppliers pursuing Construction Material Producers and Contractors should establish whether the account buys TOFA itself or a prepared pavement chemical before assigning sales responsibility.

[redacted] Consequently, an industrial application does not necessarily place the purchaser outside chemical manufacturing. allnex's documented TOFA-based resin illustrates why the conversion establishment can be the relevant prospect even when its customer operates in coatings.

For Fuel and Lubricant Manufacturers, the buying mandate must distinguish feedstock procurement from additive or lubricant purchasing. For Oil and Gas Producers and Service Companies and Mining and Mineral Processing Companies, suppliers should identify whether the operator, service company or specialty-chemical vendor controls the raw-material order. [redacted]

Purchasing authority also differs from application suitability. allnex's March 2024 Americas purchasing terms identify the buyer through the purchase order and require written consent for changes to goods. [redacted]

Figure 12. Global Tall Oil Fatty Acids Market Size, by Buyer Industry, 2025 (%)

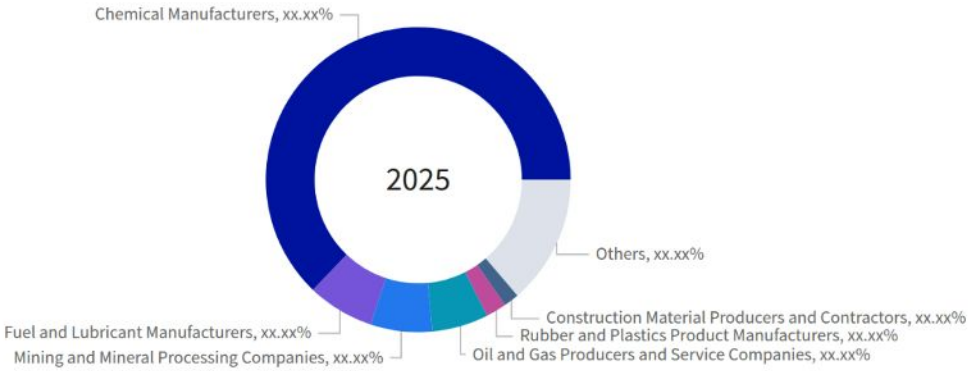

Figure 13. Global Tall Oil Fatty Acids Market, by Buyer Industry, 2032 (USD Million)

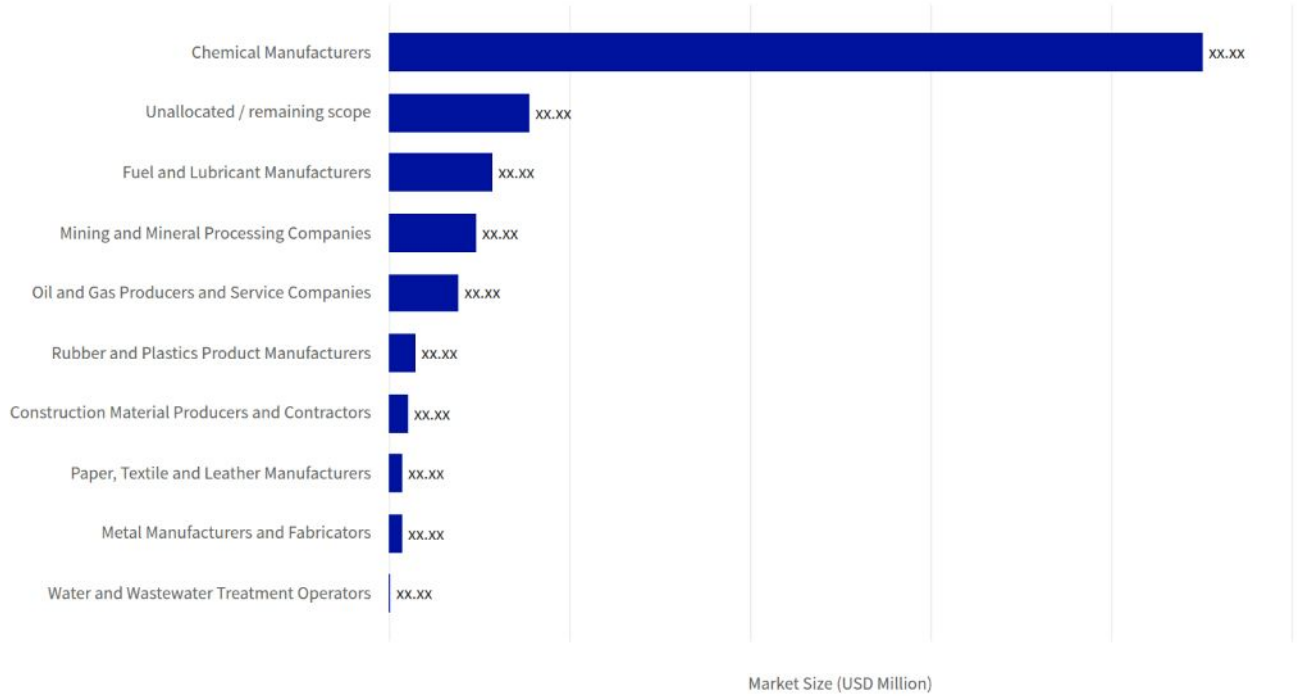

Table 56. Global Tall Oil Fatty Acids Market, by Buyer Industry growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 57. Global Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E807], [E745], [E192], [E11], [E465], [E26], [E380], [E393], [E386] Buyer Industry

Evidence: [E812], [E819], [E191], [E16], [E441], [E451], [E453], [E452], [E450], [E454], [E391], [E390], [E869], [E866], [E868], [E865] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E812], [E819], [E191], [E16], [E441], [E451], [E453], [E452], [E450], [E454], [E391], [E390], [E869], [E866], [E868], [E865] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E402] Taxonomy evidence: Segmentation

9.1. Chemical Manufacturers

Table 58. Global Tall Oil Fatty Acids Market, by Chemical Manufacturers growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 59. Global Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 60. Global Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 61. Global Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E378] Taxonomy evidence: Segmentation

Evidence: [E376], [E812], [E801], [E448], [E381], [E388], [E395], [E21], [E22], [E16] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E376], [E812], [E801], [E448], [E381], [E388], [E395], [E21], [E22], [E16] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9.1.1. Resin and Synthetic Rubber Manufacturers

Table 62. Global Tall Oil Fatty Acids Market Size, by Resin and Synthetic Rubber Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 63. Global Tall Oil Fatty Acids Market Size, by Resin and Synthetic Rubber Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 64. Global Tall Oil Fatty Acids Market Size, by Resin and Synthetic Rubber Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E379] Taxonomy evidence: Segmentation

Evidence: [E381], [E21] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E381], [E21] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9.1.2. Basic Chemical and Oleochemical Manufacturers

Table 65. Global Tall Oil Fatty Acids Market Size, by Basic Chemical and Oleochemical Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 66. Global Tall Oil Fatty Acids Market Size, by Basic Chemical and Oleochemical Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 67. Global Tall Oil Fatty Acids Market Size, by Basic Chemical and Oleochemical Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E384], [E377] Taxonomy evidence: Segmentation

Evidence: [E376] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E376] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9.1.3. Adhesive and Industrial Additive Manufacturers

Table 68. Global Tall Oil Fatty Acids Market Size, by Adhesive and Industrial Additive Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 69. Global Tall Oil Fatty Acids Market Size, by Adhesive and Industrial Additive Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 70. Global Tall Oil Fatty Acids Market Size, by Adhesive and Industrial Additive Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E394], [E392] Taxonomy evidence: Segmentation

Evidence: [E395], [E801] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E395], [E801] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9.1.4. Coating and Ink Manufacturers

Table 71. Global Tall Oil Fatty Acids Market Size, by Coating and Ink Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 72. Global Tall Oil Fatty Acids Market Size, by Coating and Ink Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 73. Global Tall Oil Fatty Acids Market Size, by Coating and Ink Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E383] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E22] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E22] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.1.5. Soap, Detergent and Personal Care Manufacturers

Table 74. Global Tall Oil Fatty Acids Market Size, by Soap, Detergent and Personal Care Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 75. Global Tall Oil Fatty Acids Market Size, by Soap, Detergent and Personal Care Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 76. Global Tall Oil Fatty Acids Market Size, by Soap, Detergent and Personal Care Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E385], [E387] Taxonomy evidence: Segmentation

Evidence: [E388] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E388] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9.1.6. Pesticide and Disinfectant Manufacturers

Table 77. Global Tall Oil Fatty Acids Market Size, by Pesticide and Disinfectant Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 78. Global Tall Oil Fatty Acids Market Size, by Pesticide and Disinfectant Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 79. Global Tall Oil Fatty Acids Market Size, by Pesticide and Disinfectant Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E382] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E448] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E448] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.2. Fuel and Lubricant Manufacturers

Table 80. Global Tall Oil Fatty Acids Market Size, by Fuel and Lubricant Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 81. Global Tall Oil Fatty Acids Market Size, by Fuel and Lubricant Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 82. Global Tall Oil Fatty Acids Market Size, by Fuel and Lubricant Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E324], [E325], [E375] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E441], [E191] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E441], [E191] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.3. Mining and Mineral Processing Companies

Table 83. Global Tall Oil Fatty Acids Market Size, by Mining and Mineral Processing Companies, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 84. Global Tall Oil Fatty Acids Market Size, by Mining and Mineral Processing Companies, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 85. Global Tall Oil Fatty Acids Market Size, by Mining and Mineral Processing Companies, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E397] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E866] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E866] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.4. Oil and Gas Producers and Service Companies

Table 86. Global Tall Oil Fatty Acids Market Size, by Oil and Gas Producers and Service Companies, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 87. Global Tall Oil Fatty Acids Market Size, by Oil and Gas Producers and Service Companies, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 88. Global Tall Oil Fatty Acids Market Size, by Oil and Gas Producers and Service Companies, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E396] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E451], [E869] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E451], [E869] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.5. Rubber and Plastics Product Manufacturers

Table 89. Global Tall Oil Fatty Acids Market Size, by Rubber and Plastics Product Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 90. Global Tall Oil Fatty Acids Market Size, by Rubber and Plastics Product Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 91. Global Tall Oil Fatty Acids Market Size, by Rubber and Plastics Product Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E398] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E868] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E868] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.6. Construction Material Producers and Contractors

Table 92. Global Tall Oil Fatty Acids Market Size, by Construction Material Producers and Contractors, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 93. Global Tall Oil Fatty Acids Market Size, by Construction Material Producers and Contractors, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 94. Global Tall Oil Fatty Acids Market Size, by Construction Material Producers and Contractors, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E389], [E399], [E404] Taxonomy evidence: Segmentation

Evidence: [E390], [E819], [E450] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E390], [E819], [E450] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

9.7. Paper, Textile and Leather Manufacturers

Table 95. Global Tall Oil Fatty Acids Market Size, by Paper, Textile and Leather Manufacturers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 96. Global Tall Oil Fatty Acids Market Size, by Paper, Textile and Leather Manufacturers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 97. Global Tall Oil Fatty Acids Market Size, by Paper, Textile and Leather Manufacturers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E400] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E453], [E391] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E453], [E391] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.8. Metal Manufacturers and Fabricators

Table 98. Global Tall Oil Fatty Acids Market Size, by Metal Manufacturers and Fabricators, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 99. Global Tall Oil Fatty Acids Market Size, by Metal Manufacturers and Fabricators, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 100. Global Tall Oil Fatty Acids Market Size, by Metal Manufacturers and Fabricators, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E401] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E452], [E865] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E452], [E865] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

9.9. Water and Wastewater Treatment Operators

Table 101. Global Tall Oil Fatty Acids Market Size, by Water and Wastewater Treatment Operators, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 102. Global Tall Oil Fatty Acids Market Size, by Water and Wastewater Treatment Operators, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 103. Global Tall Oil Fatty Acids Market Size, by Water and Wastewater Treatment Operators, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E403] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E454] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E454] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

10. Tall Oil Fatty Acids Market, by Delivery Format

Delivery Format changes the service commitment attached to an otherwise acceptable TOFA grade. ■■■■■■■■■ ■■■■■ ■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■ A buyer should therefore secure the named format and destination in the order rather than assume that grade approval includes every advertised package.

Intermediate Bulk Containers are a distinct containment category, not another name for Drums or Jerrycans. ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ Where a proposed direct offer lacks the required packaging service, a documented distributor service can be an alternative, but only if it covers the approved material and destination.

Jerrycans requires particularly explicit confirmation. Lesohimiya advertises this format for its TOFA offering and describes delivery across Russia and the CIS. ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■

Figure 14. Global Tall Oil Fatty Acids Market Size, by Delivery Format, 2025 (%)

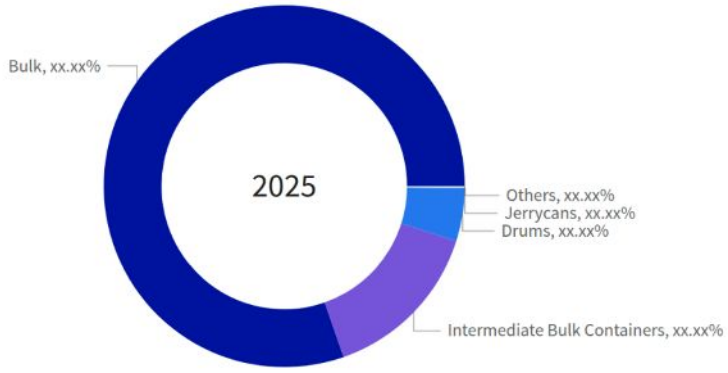

Figure 15. Global Tall Oil Fatty Acids Market, by Delivery Format, 2032 (USD Million)

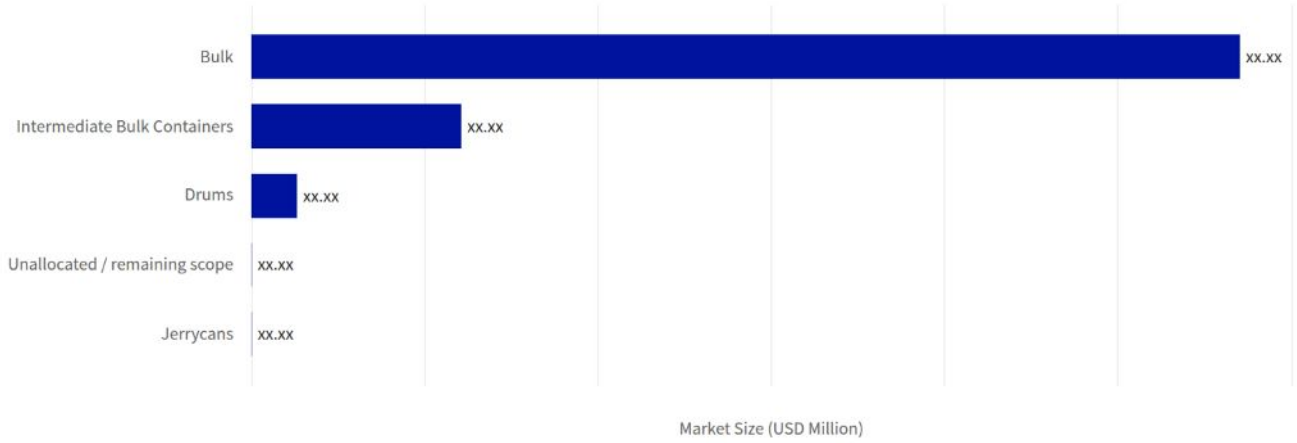

Table 104. Global Tall Oil Fatty Acids Market, by Delivery Format growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 105. Global Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E608], [E883], [E301], [E222], [E355] Delivery Format

Evidence: [E607], [E609], [E870], [E863], [E864], [E302], [E307], [E297], [E223], [E353], [E347], [E349], [E657], [E659], [E15], [E9], [E17], [E13], [E186], [E45], [E43], [E44], [E46] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E870], [E863], [E864], [E302], [E307], [E297], [E223], [E353], [E347], [E349], [E657], [E659], [E15], [E9], [E17], [E13], [E186], [E45], [E43], [E44], [E46] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E352], [E356], [E100], [E658] Taxonomy evidence: Segmentation

10.1. Bulk

Table 106. Global Tall Oil Fatty Acids Market Size, by Bulk, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 107. Global Tall Oil Fatty Acids Market Size, by Bulk, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 108. Global Tall Oil Fatty Acids Market Size, by Bulk, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E611], [E99] Taxonomy evidence: Segmentation

Evidence: [E607], [E302], [E870], [E15], [E186], [E45] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E302], [E870], [E15], [E186], [E45] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

10.2. Intermediate Bulk Containers

Table 109. Global Tall Oil Fatty Acids Market Size, by Intermediate Bulk Containers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 110. Global Tall Oil Fatty Acids Market Size, by Intermediate Bulk Containers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 111. Global Tall Oil Fatty Acids Market Size, by Intermediate Bulk Containers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E348], [E354], [E613], [E97] Taxonomy evidence: Segmentation

Evidence: [E353], [E307], [E863], [E9], [E657], [E43] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E353], [E609], [E307], [E863], [E9], [E657], [E43] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

10.3. Drums

Table 112. Global Tall Oil Fatty Acids Market Size, by Drums, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 113. Global Tall Oil Fatty Acids Market Size, by Drums, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 114. Global Tall Oil Fatty Acids Market Size, by Drums, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E346], [E345], [E98] Taxonomy evidence: Segmentation

Evidence: [E347], [E297], [E864], [E17], [E659], [E44] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E347], [E297], [E864], [E17], [E659], [E44] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

10.4. Jerrycans

Table 115. Global Tall Oil Fatty Acids Market Size, by Jerrycans, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 116. Global Tall Oil Fatty Acids Market Size, by Jerrycans, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 117. Global Tall Oil Fatty Acids Market Size, by Jerrycans, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E351], [E350], [E224], [E225] Taxonomy evidence: Segmentation

Evidence: [E349], [E223], [E13], [E46] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E349], [E223], [E13], [E46] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

11. Tall Oil Fatty Acids Market, by Sales Channel

[redacted] Census Bureau distinguishes distributors that take title from agents and brokers representing others, and recognizes that a wholesaler can make a sale even when the manufacturer delivers directly. Physical delivery from a refinery therefore does not, by itself, establish Direct Sales.

[redacted] Buyers should confirm territorial authority and binding service scope. Direct Sales remains an alternative when the producer can meet the same obligations; distribution adds another commercial dependency rather than removing material-acceptance requirements.

Agent and Broker Sales requires different accountability checks. Henry Franc describes itself as an external sales force that does not resell or trade: its producer principals deliver and invoice customers directly. [redacted]

Figure 16. Global Tall Oil Fatty Acids Market Size, by Sales Channel, 2025 (%)

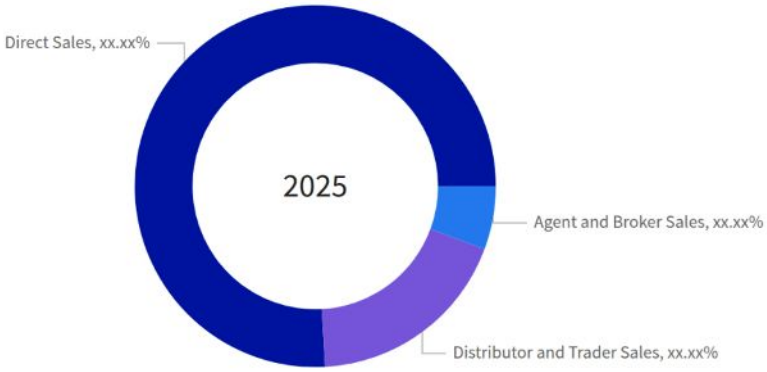

Figure 17. Global Tall Oil Fatty Acids Market, by Sales Channel, 2032 (USD Million)

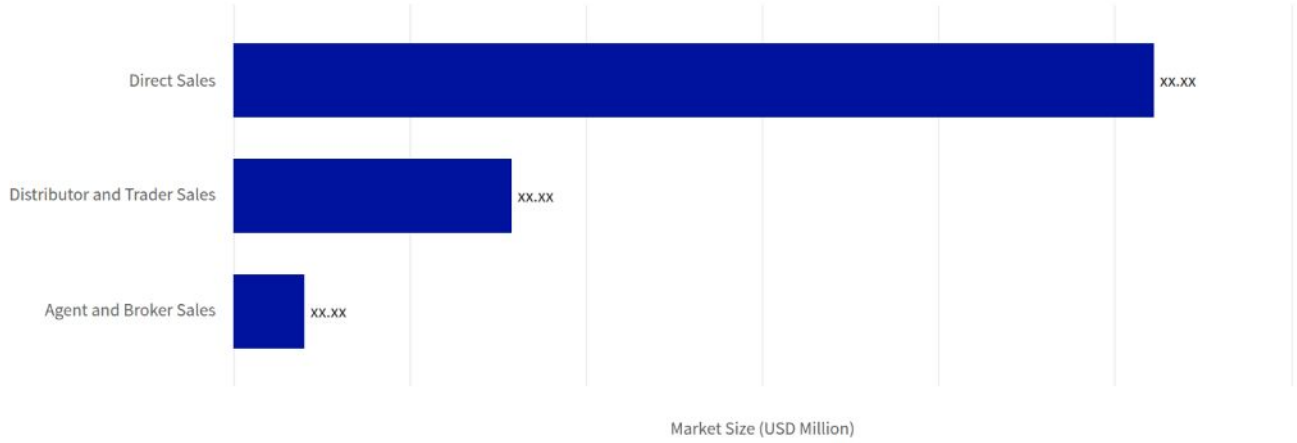

Table 118. Global Tall Oil Fatty Acids Market, by Sales Channel growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 119. Global Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E877], [E662], [E654], [E615], [E483] Sales Channel

Evidence: [E486], [E485], [E478] Taxonomy evidence: Segmentation

11.1. Direct Sales

Table 120. Global Tall Oil Fatty Acids Market Size, by Direct Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 121. Global Tall Oil Fatty Acids Market Size, by Direct Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 122. Global Tall Oil Fatty Acids Market Size, by Direct Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E477], [E475], [E620] Taxonomy evidence: Segmentation

Evidence: [E618], [E894], [E405], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

11.2. Distributor and Trader Sales

Table 123. Global Tall Oil Fatty Acids Market Size, by Distributor and Trader Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 124. Global Tall Oil Fatty Acids Market Size, by Distributor and Trader Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 125. Global Tall Oil Fatty Acids Market Size, by Distributor and Trader Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E480], [E479], [E476] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

11.3. Agent and Broker Sales

Table 126. Global Tall Oil Fatty Acids Market Size, by Agent and Broker Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 127. Global Tall Oil Fatty Acids Market Size, by Agent and Broker Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 128. Global Tall Oil Fatty Acids Market Size, by Agent and Broker Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E482], [E481], [E665], [E656] Taxonomy evidence: Segmentation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

12. Tall Oil Fatty Acids Market, by Sustainability Certification

▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ This establishes commercial relevance, not certification transfer under every subsequent TOFA contract. Buyers should select the scheme required by their purchasing context rather than treat the labels as interchangeable.

▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Where that distinction matters to the buyer's downstream claim, the required chain-of-custody basis should be stated in the agreement. A valid certification claim also does not establish acceptance of a particular Low-Rosin TOFA or Higher-Rosin TOFA grade.

▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Scheme participation should not create duplicate claims: ISCC PLUS prohibits multiple accounting of the same sustainability characteristics. Buyers and sellers should establish the outgoing transaction's claim rather than infer it solely from the supplier's certificates.

▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ Parties contracting across that transition should confirm applicable documentation and responsibilities before promising continuity. The transition is a forward contractual condition, not evidence of the certification basis of an earlier purchase.

Figure 18. Global Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2025 (%)

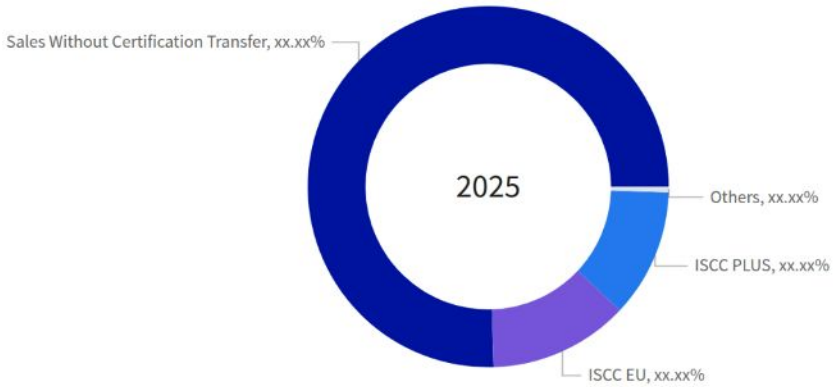

Figure 19. Global Tall Oil Fatty Acids Market, by Sustainability Certification, 2032 (USD Million)

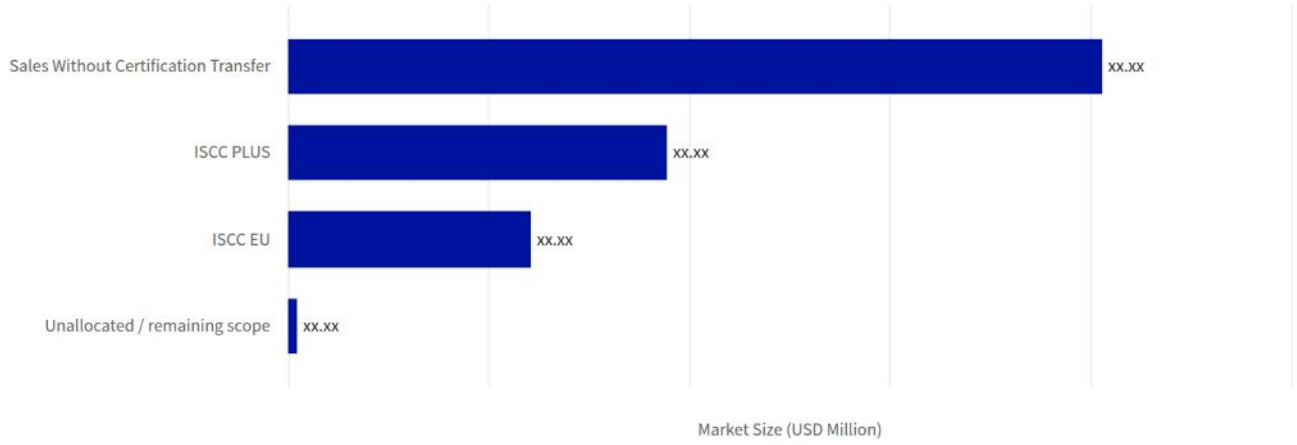

Table 129. Global Tall Oil Fatty Acids Market, by Sustainability Certification growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 130. Global Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E175], [E66], [E166], [E709], [E547] Sustainability Certification

Evidence: [E71], [E72], [E712], [E716], [E713], [E708], [E703], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E717], [E715], [E548], [E705], [E701] Taxonomy evidence: Segmentation

Evidence: [E712], [E716], [E713], [E708], [E703], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

12.1. Sales Without Certification Transfer

Table 131. Global Tall Oil Fatty Acids Market Size, by Sales Without Certification Transfer, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 132. Global Tall Oil Fatty Acids Market Size, by Sales Without Certification Transfer, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 133. Global Tall Oil Fatty Acids Market Size, by Sales Without Certification Transfer, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E707], [E706] Taxonomy evidence: Segmentation

Evidence: [E703], [E621], [E134], [E747], [E713], [E101] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E703], [E134], [E747], [E713], [E72], [E101] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

12.2. ISCC EU

Table 134. Global Tall Oil Fatty Acids Market Size, by ISCC EU, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 135. Global Tall Oil Fatty Acids Market Size, by ISCC EU, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 136. Global Tall Oil Fatty Acids Market Size, by ISCC EU, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E714], [E167], [E550] Taxonomy evidence: Segmentation

Evidence: [E712], [E619], [E133], [E152], [E129], [E746], [E102] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E712], [E129], [E746], [E102] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

12.3. ISCC PLUS

Table 137. Global Tall Oil Fatty Acids Market Size, by ISCC PLUS, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 138. Global Tall Oil Fatty Acids Market Size, by ISCC PLUS, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 139. Global Tall Oil Fatty Acids Market Size, by ISCC PLUS, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E711], [E710], [E702], [E704], [E177], [E549] Taxonomy evidence: Segmentation

Evidence: [E716], [E708], [E617], [E135], [E153], [E130], [E748], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E716], [E708], [E135], [E130], [E748], [E71], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

13. Tall Oil Fatty Acids Market, by Region

Asia-Pacific processing does not necessarily provide independent feedstock exposure. Harima's February 2025 disclosure describes crude tall oil procurement in the United States and transport to Japan. ■■■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■

North America requires separation of physical supply, ownership and distribution services. ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ Neither ownership transfer nor an advertised service network establishes performance under a particular order.

Latin America has a documented intermediary route in Brazil: Rudnik's catalog lists tall oil fatty acid and identifies its Brazilian business location. ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ An intermediary route is preferable only where the accepted offer resolves an actual documentation or fulfillment requirement; direct supply remains an alternative where it meets the same obligations.

Europe's sourcing relationships can include dependencies beyond the purchased material. Forchem describes crude tall oil and steam relationships with pulp mills. ■■■ ■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■ ■■■■■■■■■■■■■■

In the Middle East, DUBI CHEM advertises a named TOFA offering through its UAE business. This establishes a commercial inquiry route, not a region-wide supply commitment or evidence of local feedstock origin. ■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■ ■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■

Africa also requires destination-specific interpretation of an offering. ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■ ■ ■■■■■■■ ■■■■■■■ Portfolio breadth may facilitate procurement coordination, but does not establish stock, upstream independence or acceptance of the proposed grade.

Figure 20. Global Tall Oil Fatty Acids Market, by Region: Market share evolution, 2025-2032

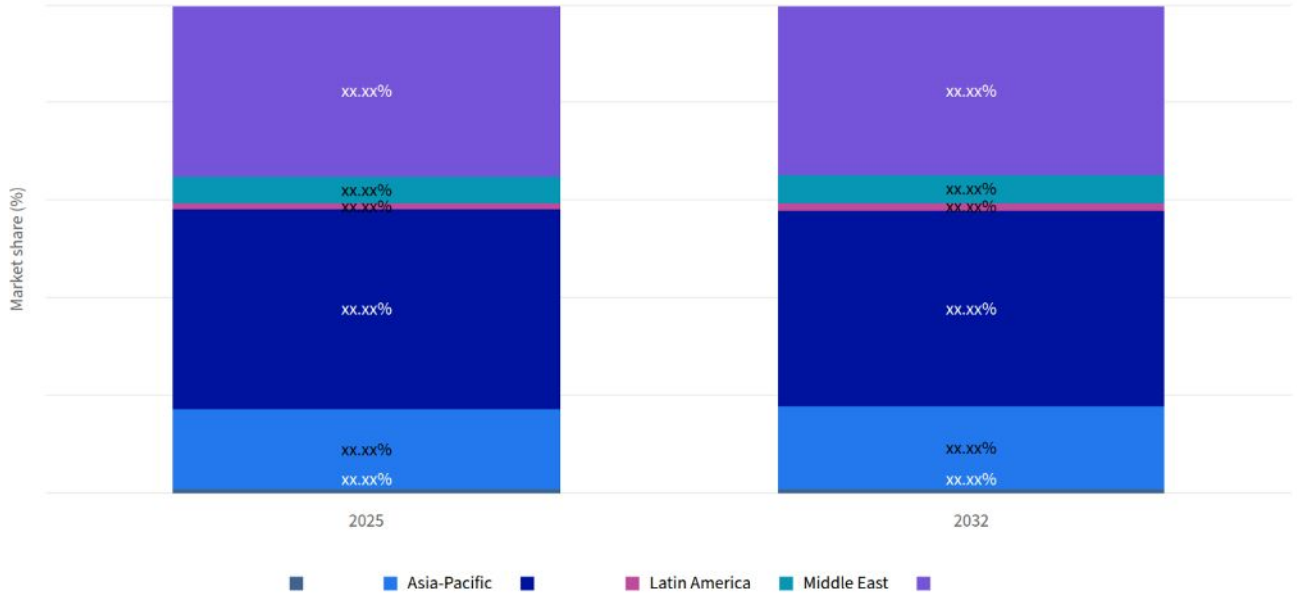

Figure 21. Global Tall Oil Fatty Acids Market, by Region: Market size by category, 2025 (USD Million)

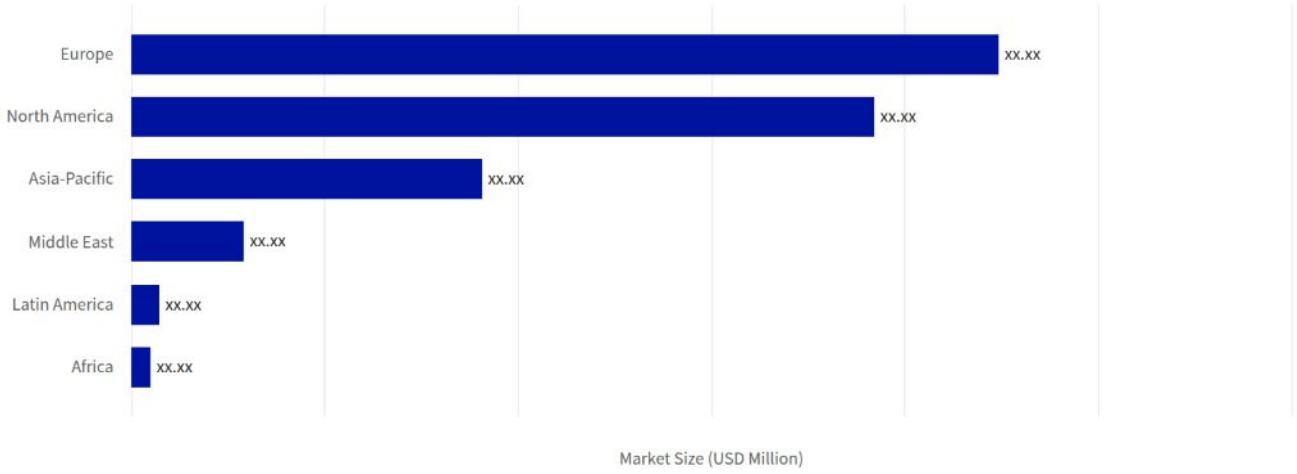

Figure 22. Global Tall Oil Fatty Acids Market, Regional growth by Rosin Acid Content, 2025-2032 (CAGR %)

Table 140. Global Tall Oil Fatty Acids Market, by Region growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 141. Global Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E809], [E643], [E878], [E589], [E280], [E89], [E861] REGION Analysis

Evidence: [E814], [E893], [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E814], [E893] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

13.1. Europe

Table 142. Europe Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 143. Europe Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 144. Europe Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 145. Europe Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 146. Europe Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 147. Europe Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 148. Europe Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 149. Europe Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 150. Europe Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E894], [E405], [E618], [E339] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Europe - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Europe - forecast-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Austria - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Belgium - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Denmark - base-year allocation

Evidence: [E406], [E614], [E338] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406], [E410] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Netherlands - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Norway - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Poland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portugal - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406], [E412] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sweden - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Switzerland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E619], [E617], [E621], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E338] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finland - forecast-year allocation

Evidence: [E342], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

13.2. North America

Table 151. North America Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 152. North America Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 153. North America Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 154. North America Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 155. North America Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 156. North America Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 157. North America Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 158. North America Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 159. North America Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E893], [E405], [E814] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North America - base-year allocation

Evidence: [E893], [E814] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: North America - forecast-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E811], [E812], [E801], [E819], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E685],

[E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E811], [E812], [E801], [E819], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

13.3. Asia-Pacific

Table 160. Asia-Pacific Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Thousand)

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 161. Asia-Pacific Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 162. Asia-Pacific Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 163. Asia-Pacific Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 164. Asia-Pacific Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 165. Asia-Pacific Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 166. Asia-Pacific Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 167. Asia-Pacific Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 168. Asia-Pacific Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E894], [E405], [E637] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - base-year allocation

Evidence: [E894] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Asia-Pacific - forecast-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Indonesia - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Malaysia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Philippines - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Singapore - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Taiwan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Thailand - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

13.4. Middle East

Table 169. Middle East Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 170. Middle East Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 171. Middle East Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 172. Middle East Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 173. Middle East Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 174. Middle East Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 175. Middle East Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 176. Middle East Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 177. Middle East Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Middle East - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Israel - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qatar - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Saudi Arabia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Turkey - base-year allocation

Evidence: [E409], [E407], [E90] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Arab Emirates - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191],

[E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

13.5. Latin America

Table 178. Latin America Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 179. Latin America Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 180. Latin America Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 181. Latin America Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 182. Latin America Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 183. Latin America Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 184. Latin America Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 185. Latin America Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 186. Latin America Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latin America - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Argentina - base-year allocation

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chile - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Colombia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Peru - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449],

[E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

13.6. Africa

Table 187. Africa Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 188. Africa Tall Oil Fatty Acids Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 189. Africa Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 190. Africa Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 191. Africa Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 192. Africa Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 193. Africa Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 194. Africa Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 195. Africa Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E405] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Egypt - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Kenya - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Nigeria - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Africa - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

14. Tall Oil Fatty Acids Market, by Group

The geography groups are overlapping, non-additive views of commercial access. ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■ ■ ■■■■ ■■■■■■ ■■■■■■

Americas account coordination can coexist with local purchasing authority. allnex publishes Americas purchasing terms, but the purchase order identifies the particular buyer and changes to goods require written consent. ■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■

Europe, Middle East & Africa is a coordination territory rather than a transferable compliance dossier. ■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ Central coordination can reduce duplicated administration, but an arrangement covering one jurisdiction should not be represented as clearing the wider territory.

ASEAN offers an origin-dependent trade mechanism. Enterprise Singapore describes preferential treatment and ASEAN cumulation under the ASEAN Trade in Goods Agreement. ■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■

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Australasia has a documented shared channel example: Redox's published Kraton appointment covers TOFA in Australia and New Zealand. That provides a basis for a coordinated inquiry, subject to confirmation of continuing authority. ■■ ■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■

[illegible] Buyers should examine the actual commitments behind a proposed Nordic backup source. These Finnish examples do not establish equivalent TOFA offerings across every Nordic constituent, and additional sellers need not eliminate common upstream exposure.

The European Union provides a shared REACH framework relevant to purchasing in countries including Germany, France, Italy and Spain. Suppliers can organize material identity, applicable registration-or-exemption reasoning and supply-chain information consistently within that framework. [illegible]

BRICS-related transaction facilitation should be distinguished from an executable TOFA payment route. [illegible] Sellers comparing transactions involving Brazil and South Africa should verify bank acceptance, contractual settlement terms and enforceability before treating the grouping as a commercial advantage.

G7 cooperation provides a responsible-sourcing policy reference, not a harmonized TOFA purchasing mandate. Its accountability report addresses labor, social and environmental standards in global supply chains. [illegible]

NATO represents an institutional procurement route, not a proxy for civilian TOFA demand. U.S. government guidance identifies NSPA purchasing of supplies and road-repair materials and describes its supplier Source File. [illegible]

Figure 23. Global Tall Oil Fatty Acids Market Size, by Group, 2025 vs 2026 vs 2032 (USD Million)

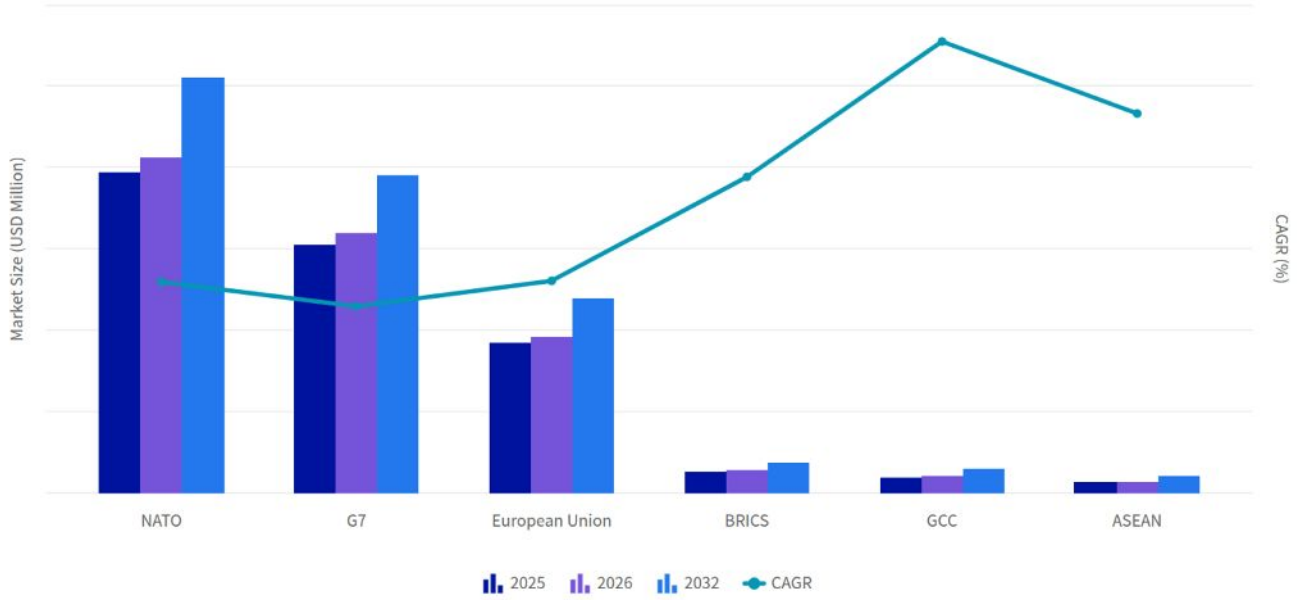

Table 196. Global Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Evidence: [E558], [E888], [E103], [E12], [E681], [E533], [E142], [E270], [E696], [E537], [E275], [E154], [E439] GROUP Analysis

14.1. NATO

Table 197. NATO Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Thousand)

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 197 - continued

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 198. NATO Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 198 - continued

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 199. NATO Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 200. NATO Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 201. NATO Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 202. NATO Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 203. NATO Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 204. NATO Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 205. NATO Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Belgium - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bulgaria - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Croatia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Czech Republic - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Denmark - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Estonia - base-year allocation

Evidence: [E406], [E614], [E338] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Greece - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hungary - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Iceland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latvia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Lithuania - base-year allocation

Evidence: [E406], [E410] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Netherlands - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Norway - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Poland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portugal - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Romania - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Slovakia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Slovenia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406], [E412] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sweden - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Turkey - base-year allocation

Evidence: [E414] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Luxembourg - base-year allocation

Evidence: [E414] Evidence informing base-year allocation inputs; displayed values and growth are calculated: North Macedonia - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E811], [E812], [E801], [E819], [E619], [E617], [E621], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870],

[E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E811], [E812], [E801], [E819], [E342], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

Evidence: [E338] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finland - forecast-year allocation

14.2. G7

Table 206. G7 Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 207. G7 Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 208. G7 Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 209. G7 Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 210. G7 Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 211. G7 Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 212. G7 Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 213. G7 Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 214. G7 Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E811], [E812], [E801], [E819], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E811], [E812], [E801], [E819], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

14.3. European Union

Table 215. European Union Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Thousand)

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 216. European Union Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 217. European Union Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 218. European Union Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 219. European Union Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 220. European Union Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 221. European Union Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 222. European Union Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 223. European Union Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Austria - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Belgium - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bulgaria - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Croatia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Czech Republic - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Denmark - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Estonia - base-year allocation

Evidence: [E406], [E614], [E338] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Greece - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hungary - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ireland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Latvia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Lithuania - base-year allocation

Evidence: [E406], [E410] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Netherlands - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Poland - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portugal - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Romania - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Slovakia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Slovenia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406], [E412] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sweden - base-year allocation

Evidence: [E414] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Luxembourg - base-year allocation

Evidence: [E619], [E617], [E621], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E338] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finland - forecast-year allocation

Evidence: [E342], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

14.4. BRICS

Table 224. BRICS Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 225. BRICS Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 226. BRICS Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 227. BRICS Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 228. BRICS Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 229. BRICS Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 230. BRICS Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 231. BRICS Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 232. BRICS Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Africa - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617],

[E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

14.5. GCC

Table 233. GCC Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Thousand)

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 234. GCC Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 235. GCC Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 236. GCC Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 237. GCC Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 238. GCC Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 239. GCC Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 240. GCC Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 241. GCC Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Kuwait - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oman - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qatar - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Saudi Arabia - base-year allocation

Evidence: [E409], [E407], [E90] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Arab Emirates - base-year allocation

Evidence: [E414] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bahrain - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617],

[E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

14.6. ASEAN

Table 242. ASEAN Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Thousand)

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 243. ASEAN Tall Oil Fatty Acids Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 244. ASEAN Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 245. ASEAN Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 246. ASEAN Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 247. ASEAN Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 248. ASEAN Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 249. ASEAN Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 250. ASEAN Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Indonesia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Malaysia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Philippines - base-year allocation

Evidence: [E406], [E411] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Singapore - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Thailand - base-year allocation

Evidence: [E408] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brunei - base-year allocation

Evidence: [E408] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vietnam - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685],

[E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15. Tall Oil Fatty Acids Market, by Country

United States access places an explicit documentary responsibility on the importing relationship. EPA states that the importer or its authorized agent must provide applicable TSCA import certification. ■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■

United Kingdom purchasing needs a precise distinction between Great Britain importing and domestic distribution. ■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ Representation can reduce importer administration, but should not be inferred from a reseller relationship.

■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■ ■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ This is the supplier's stated basis, not regulatory clearance for every Finnish offering or every Higher-Rosin TOFA grade. Purchasers should obtain the identity-specific justification and applicable supply-chain information rather than impose either blanket registration or blanket exemption assumptions.

Brazil presents a distinct substitution question. Pinus Brasil markets Pinusplast xx.xx as a rosin-derived alternative to tall oil fatty acid for alkyd-resin and lubricant applications. ■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■ ■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■

Figure 24. Global Tall Oil Fatty Acids Market Size, by Country, 2025 vs 2032 (%)

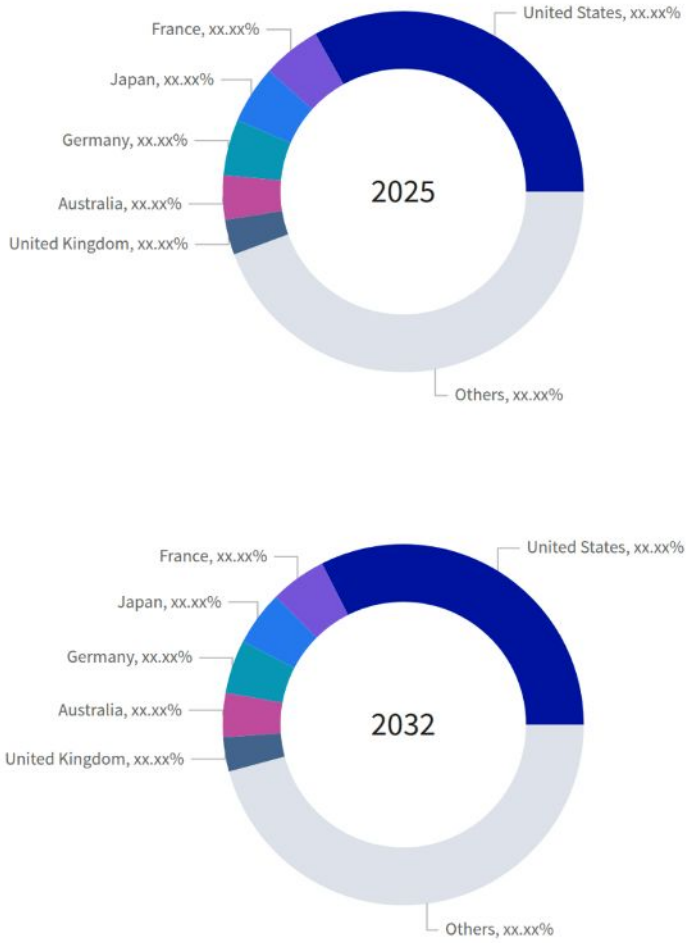

Figure 25. Global Tall Oil Fatty Acids Market Size, by Country, 2025 vs 2026 vs 2032 (USD Million)

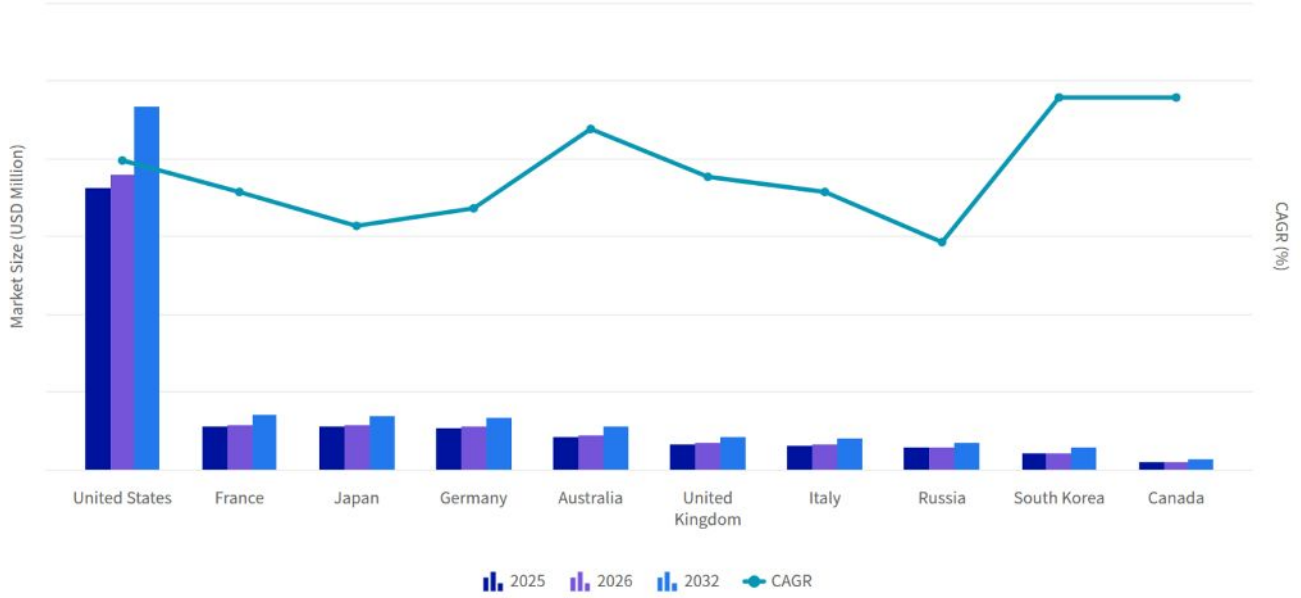

Table 251. Global Tall Oil Fatty Acids Market, by Country growth contribution, 2025-2032 (USD Million)

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 252. Global Tall Oil Fatty Acids Market Size, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E563], [E108], [E682], [E534], [E254], [E764] COUNTRY Analysis

Evidence: [E253], [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

15.1. United States

Table 253. United States Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United States	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 254. United States Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 255. United States Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 256. United States Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 257. United States Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 258. United States Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 259. United States Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 260. United States Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406], [E413], [E810] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United States - base-year allocation

Evidence: [E810] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: United States - forecast-year allocation

Evidence: [E811], [E812], [E801], [E819], [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E811], [E812], [E801], [E819], [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391],

[E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.2. France

Table 261. France Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
France	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 262. France Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 263. France Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 264. France Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 265. France Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 266. France Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 267. France Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 268. France Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: France - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.3. Japan

Table 269. Japan Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Japan	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 270. Japan Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 271. Japan Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 272. Japan Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 273. Japan Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 274. Japan Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 275. Japan Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 276. Japan Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406], [E636] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Japan - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.4. Germany

Table 277. Germany Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Germany	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 278. Germany Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 279. Germany Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 280. Germany Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 281. Germany Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 282. Germany Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Million)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 283. Germany Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 284. Germany Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Germany - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.5. Australia

Table 285. Australia Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 286. Australia Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 287. Australia Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 288. Australia Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 289. Australia Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 290. Australia Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 291. Australia Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 292. Australia Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Australia - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.6. United Kingdom

Table 293. United Kingdom Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United Kingdom	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 294. United Kingdom Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 295. United Kingdom Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 296. United Kingdom Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 297. United Kingdom Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 298. United Kingdom Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 299. United Kingdom Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 300. United Kingdom Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: United Kingdom - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716],

[E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.7. Italy

Table 301. Italy Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Italy	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 302. Italy Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 303. Italy Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 304. Italy Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 305. Italy Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 306. Italy Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 307. Italy Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 308. Italy Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Italy - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.8. Russia

Table 309. Russia Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Russia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 310. Russia Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 311. Russia Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 312. Russia Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 313. Russia Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 314. Russia Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 315. Russia Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 316. Russia Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E311] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Russia - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.9. South Korea

Table 317. South Korea Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
South Korea	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 318. South Korea Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 319. South Korea Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 320. South Korea Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 321. South Korea Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 322. South Korea Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 323. South Korea Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 324. South Korea Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: South Korea - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.10. Canada

Table 325. Canada Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 326. Canada Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 327. Canada Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 328. Canada Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Million)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 329. Canada Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 330. Canada Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 331. Canada Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 332. Canada Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Canada - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.11. China

Table 333. China Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
China	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 334. China Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 335. China Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 336. China Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 337. China Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 338. China Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 339. China Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 340. China Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: China - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.12. Spain

Table 341. Spain Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Spain	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 342. Spain Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 343. Spain Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 344. Spain Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 345. Spain Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 346. Spain Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 347. Spain Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 348. Spain Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Spain - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.13. Mexico

Table 349. Mexico Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Mexico	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 350. Mexico Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 351. Mexico Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 352. Mexico Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 353. Mexico Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 354. Mexico Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 355. Mexico Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 356. Mexico Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Mexico - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.14. India

Table 357. India Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
India	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 358. India Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 359. India Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 360. India Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 361. India Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 362. India Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 363. India Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 364. India Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406] Evidence informing base-year allocation inputs; displayed values and growth are calculated: India - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

15.15. Brazil

Table 365. Brazil Tall Oil Fatty Acids Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 366. Brazil Tall Oil Fatty Acids Market Size, by Rosin Acid Content, 2017-2040 (USD Million)

Rosin Acid Content	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Higher-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low-Rosin TOFA	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 367. Brazil Tall Oil Fatty Acids Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agrochemical Formulations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cleaning and Personal Care Products	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coatings, Inks, Adhesives and Sealants	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Materials and Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Additives	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lubricants and Metalworking Fluids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mineral Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oilfield Chemicals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oleochemical Intermediate Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Polymer Production	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water Treatment	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 368. Brazil Tall Oil Fatty Acids Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Chemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction Material Producers and Contractors	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Fuel and Lubricant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Metal Manufacturers and Fabricators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining and Mineral Processing Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oil and Gas Producers and Service Companies	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Paper, Textile and Leather Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Rubber and Plastics Product Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Water and Wastewater Treatment Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 369. Brazil Tall Oil Fatty Acids Market Size, by Chemical Manufacturers, 2017-2040 (USD Million)

Chemical Manufacturers	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Adhesive and Industrial Additive Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Basic Chemical and Oleochemical Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Coating and Ink Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Pesticide and Disinfectant Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Resin and Synthetic Rubber Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Soap, Detergent and Personal Care Manufacturers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 370. Brazil Tall Oil Fatty Acids Market Size, by Delivery Format, 2017-2040 (USD Thousand)

Delivery Format	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulk	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drums	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Intermediate Bulk Containers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Jerrycans	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 371. Brazil Tall Oil Fatty Acids Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agent and Broker Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Distributor and Trader Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 372. Brazil Tall Oil Fatty Acids Market Size, by Sustainability Certification, 2017-2040 (USD Million)

Sustainability Certification	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ISCC EU	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
ISCC PLUS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sales Without Certification Transfer	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Evidence: [E406], [E253] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil - base-year allocation

Evidence: [E253] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil - forecast-year allocation

Evidence: [E626], [E627], [E598], [E601], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E795], [E796], [E794], [E797], [E576], [E586], [E587], [E578], [E588], [E209], [E206], [E210], [E207], [E218], [E208], [E214], [E217], [E445], [E449], [E466], [E467], [E470], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E685], [E684], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E619], [E617], [E621], [E133], [E135], [E134], [E152], [E153], [E129], [E130], [E746], [E748], [E747], [E712], [E716], [E713], [E708], [E703], [E102], [E101], [E221] Evidence informing base-year allocation inputs; displayed values and growth are calculated: Segmentation - base-year allocation

Evidence: [E626], [E627], [E598], [E601], [E607], [E609], [E300], [E302], [E307], [E297], [E132], [E131], [E343], [E344], [E337], [E336], [E576], [E586], [E587], [E578], [E588], [E441], [E451], [E453], [E452], [E450], [E454], [E448], [E811], [E812], [E801], [E819], [E119], [E342], [E739], [E685], [E684], [E686], [E687], [E321], [E315], [E319], [E376], [E381], [E388], [E395], [E391], [E390], [E21], [E22], [E869], [E866], [E868], [E865], [E870], [E863], [E864], [E191], [E16], [E15], [E9], [E17], [E13], [E657], [E659], [E186], [E223], [E45], [E43], [E44], [E46], [E353], [E347], [E349], [E135], [E134], [E129], [E130], [E746], [E748], [E747], [E712], [E716],

[E713], [E708], [E703], [E71], [E72], [E102], [E101], [E178], [E221] Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Segmentation - forecast-year allocation

16. Competitive Landscape

16.1. Market Share Analysis, 2025

Competitive positioning in TOFA depends on access to an accepted grade through an accountable purchasing route. Kraton's SYLFAT xx.xx documentation leaves application suitability with the user and qualifies delivery formats by availability. ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪

North American intermediaries offer different fulfillment propositions. ChemCeed advertises drums, totes and bulk; Catalynt Solutions, Inc. lists bulk and totes; and GJ Chemical markets its named LFA offering through bulk and smaller delivery arrangements. ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ Buyers elsewhere must establish destination-specific availability rather than extrapolate from the Canadian catalog. A distributor adds value where it closes a documented fulfillment gap; a producer-direct offer remains an alternative when it meets the same requirements.

Mexican account access also requires separation of a product listing from a broader chemical business. ▪▪▪▪▪▪▪ ▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ These routes can support local inquiries without establishing local TOFA production or interchangeable grades.

▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Their competitive relevance is local account access or a named-brand route, not an inferred refinery position. Buyers should establish the actual importing or selling entity and upstream commitment before relying on these channels for continuity.

Chemicals Global provides a cross-border TOFA quotation route, but general regional coverage does not establish product-specific commitments in each country. Neoquim Indústrias Químicas Ltda.'s broader manufacturing, resale and import activities do not settle which role applies to a proposed TOFA offer. ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

For incumbents, the defensible position is an accepted named offering with clear responsibility for service and claims. For intermediaries, the opportunity is a specific delivery, packaging or territorial-access gap that the principal does not already cover. ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪

Figure 26. Global Tall Oil Fatty Acids Market Share, by Key Player, 2025

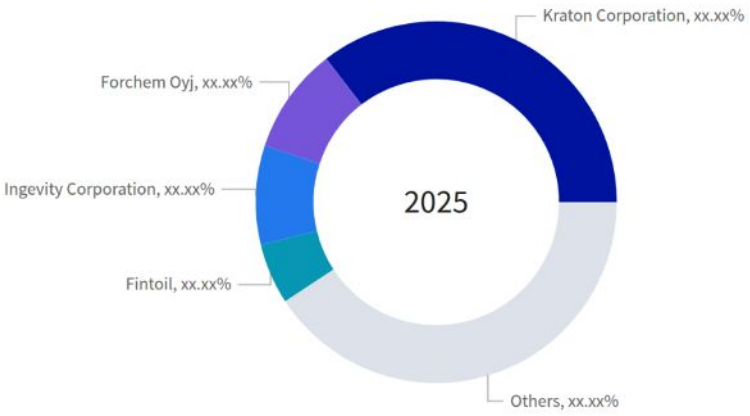

Table 373. Global Tall Oil Fatty Acids Market Share, by Key Player, 2025

Key Player	Share (%)
Fintoil	xx.xx
Forchem Oyj	xx.xx
Harima Chemicals Group, Inc.	xx.xx
Ingevity Corporation	xx.xx
Kraton Corporation	xx.xx
Others	xx.xx

Evidence: [E298], [E776], [E783], [E36], [E47], [E357], [E144], [E843], [E628], [E367], [E504], [E150], [E690], [E538], [E918], [E276], [E259], [E52], [E738], [E417]

Evidence: [E798], [E793], [E199], [E195], [E616], [E569], [E136], [E121], [E638], [E639], [E647], [E813] Evidence informing base-year company-share estimates: Company - base-year company share

16.2. Market Concentration Analysis, 2025

[redacted] This changes ownership rather than establishing another physical source. Ingevity's documented TOFA purchasing role and retained-business rights must also be distinguished from continuing external merchant supply.

[redacted] Parchem Fine & Specialty Chemicals' Resinoline listing is another commercial contact, not proof of separate production. Continuing authority, including Quimidroga's relevant mandate, must be confirmed for the actual destination.

Quadra names Fujian Shaxian SongChuan Chemical behind its Canadian L1-C and L5 listings. Those grades therefore retain the same disclosed supplier dependency. [redacted] Manglore Chemical's TOFA page also uses an RXSOL business identity in its commercial footer. The relevant comparison must establish the legal seller, upstream principal and allocation of claims responsibility without assuming that similar branding proves common ownership.

Geographic labels can also conceal common upstream exposure. [redacted] Geographic diversification requires transaction-specific origin and sourcing commitments; the alternative can improve regional access without necessarily changing upstream dependence.

[redacted] These are different routes to investigate, not interchangeable evidence of refinery control or cross-border eligibility. A buyer should

establish the actual producer and destination access before treating any route as additional physical redundancy.

OOO Torgoviy Dom Lesokhimik still requires an exact-entity current offer and documented source relationship; a separately named Lesohimiya business cannot be assigned to it without an identity link. Pine Chemical Group Oy's historical registry-related record does not establish a current Finnish TOFA role. ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■

Entry choices consequently differ by business model. ■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■ ■■■■■■■ ■■■■■ ■■ ■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■ Direct purchasing avoids that intermediary relationship where the producer meets the same requirements; acquiring an asset changes ownership obligations but does not itself establish customer acceptance or an available merchant offering.

Evidence: [E556], [E820], [E640], [E876], [E661], [E88], [E269], [E433], [E771], [E772], [E780], [E329], [E34], [E758], [E249], [E243], [E227], [E313], [E694], [E281], [E27], [E841], [E115]

16.3. Recent Developments & Impact Analysis, 2025

The North Charleston refinery transfer closed on January xx.xx 2026. Its immediate competitive consequence is a need to remap counterparties and product responsibilities, not presumed physical supply expansion. ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■

Taaleri's August xx.xx 2026 announcement confirms completion of the first stage of Fintoil's financing round with HitecVision and distinguishes additional investment commitments from that completed stage. ■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ Chemical purchasers should nevertheless obtain a named TOFA commitment: financing does not establish how a mixed FinFA business will allocate products between fuel and chemical customers.

Cestoil's EcoTall portfolio carries a September 2026 product-data update. ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■ ■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■ Customers can use the updated grade architecture to request a more precise offer, while retaining separate requirements for origin, acceptance and delivery accountability.

■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ Shima Trading Co., Ltd.'s L-xx.xx catalog association requires successor-principal confirmation before a buyer relies on the historical Ingevity relationship. The relevant trigger is an updated principal authorization and accepted order identifying the responsible seller; continuity should not be inferred solely because the legacy product remains visible in a catalog.

Evidence: [E823], [E127], [E849], [E491], [E837]

16.4. Product Portfolio Analysis, 2025

[redacted] Cestoil Chemical Inc.'s EcoTall L1, L1A, L1S, L3 and L5 range adds another differentiated grade architecture. These catalogs broaden the purchasing shortlist, but neither portfolio breadth nor similar application language establishes buyer-approved interchangeability.

Lascaray S.A. and Henry Franc SAS connect differentiated products with a specific producer-representation route. [redacted] Buyers should reconcile the named product and its documentation before treating TO-xx.xx as equivalent to another approved higher-rosin offering.

[redacted] A family-level fuel or chemical customer reference does not establish a commitment for a particular TOFA product. Surfachem Group Ltd's SURFAC TOFA family similarly provides branded alternatives to evaluate, but branding does not establish the upstream manufacturer or source independence.

Fuel-related portfolios address different purchasing decisions. Pasand Chemical describes Pasand TOFA as a blend, while PerFuel advertises TOFA-based lubricity improvers. [redacted]

Miracema-Nuodex's Liacid descriptions and Chempri's Tall oil xx.xx% offering leave a product-specific TOFA-versus-other-tall-oil distinction to resolve. [redacted] The supplier-issued offer should settle the commercial classification and responsible seller before these products are compared with FOR5, TO-xx.xx or another accepted higher-rosin material.

Adjacent portfolios provide context, not automatic raw-material alternatives. Sunpine AB's published range emphasizes raw tall diesel, bio-oil, rosin and other products; a separately marketed merchant TOFA offer remains unestablished. [redacted]

Evidence: [E197], [E575], [E652], [E123], [E727], [E331], [E489], [E762], [E857], [E252], [E231], [E56], [E854], [E138]

16.5. Benchmarking Analysis, 2025

[illegible] Portfolio breadth is relevant only after these conditions align. Producer, distributor, trader, agent and downstream converter should therefore be compared in separate commercial peer groups rather than placed in a single capability league table.

[illegible] Chemical Supplies UK's TOFA xx.xx storefront does not itself establish an accepted delivery commitment or the accountable seller. Buyers should select among these routes only after matching the required grade and contractual service, not from storefront presence alone.

DutCH2, UCY business services & trading GmbH, Chemaxa, Gioma Varo and G.C. [illegible] A trading portfolio can broaden commercial access without establishing production ownership.

[illegible] FRP Services Europe SARL requires confirmation of the current HARTALL FA-xx.xx offer, principal and selling authority. Procurement should distinguish a document, a broader supplier relationship and a product-specific accepted order.

In Türkiye, Ataman Kimya A.Ş., COS KİMYA and Elite Chemicals Kimya San. ve Tic A.Ş. have product-specific or application-portfolio TOFA entries. [illegible]

Gulf Multi Trading Company L.L.[redacted] Regional contactability is not equivalent to a binding regional supply obligation.

[redacted] BIECO requires a product-specific offer rather than a general oleochemicals category. These distinctions favor an accountable importing or distribution arrangement where local manufacturing has not been established.

[redacted] CountMe Chemicals' platform presentation leaves a separate question about which merchant would accept and fulfill the TOFA order. A marketplace route can be useful only after that counterparty and its obligations are identified.

Chinese supplier comparisons should preserve entity and product attribution. [redacted] The current contracting role and identity-to-product connection remain unresolved for Chilüe (Shanghai) Maoyi Youxian Gongsi, Jintenglong Huagong and Shanghai Xiaoyan Keji Youxian Gongsi.

In India, Insta Chemi Private Limited and Santosh Polymers provide TOFA quotation routes, but their product-specific source and manufacturing-versus-resale responsibilities require confirmation. S. R. CHEMICAL's conflicting product descriptors require reconciliation before its listing is used as an accepted alternative. [redacted]

Southeast Asian access is similarly product-specific. [redacted]

[redacted] For Chem Global Sdn Bhd, International Scientific (Pte) Ltd, Nufa Sdn Bhd and Obetech Pacific Philippines, the exact local seller, named offering and continuing principal relationship remain unresolved; a wider group or regional footprint cannot supply those missing commitments.

In Australasia, Redox Limited's documented Kraton relationship supplies a principal-specific route to investigate, subject to confirmation of continuing authority and country-specific obligations. [redacted] Neither should be selected solely from a broad distribution identity or a historical product association.

Chemiworld Pvt. Ltd., Al-Riaz Agencies Private Limited and Chemical Products And Services require exact operating-entity attribution and a current TOFA principal or supplier relationship before importer, agent and reseller models can be compared. [redacted]

Evidence: [E272], [E898], [E675], [E498], [E93], [E374], [E39], [E622], [E788], [E735], [E631], [E427], [E245], [E750], [E431], [E74], [E530], [E147], [E541], [E255], [E732], [E155], [E502], [E511], [E718], [E721], [E698], [E286], [E846], [E496], [E423], [E440], [E58]

17. Company Profiles

17.1. Kraton Corporation

Kraton provides an application-led branded TOFA portfolio through SYLFAT FA2, SYLFAT 2LT, SYLFAT FA1 and SYLFAT xx.xx. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ These application statements identify offerings to evaluate; they do not establish approval of every SYLFAT grade for a particular buyer.

The named grade and governing agreement are the practical purchasing units. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Buyers should compare a proposed replacement with the incumbent named offering rather than treat the SYLFAT family designation as blanket interchangeability.

Evidence: [E198], [E189], [E303] Kraton Corporation

Evidence: [E84], [E85], [E193], [E194], [E83] Company verification: Company

17.2. Mainstream Pine Products, LLC

Mainstream Pine Products is the acquired-business successor to Ingevity's North Charleston crude tall oil refinery and specified Industrial Specialties assets. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ Customers evaluating continuity should distinguish the successor counterparty from a genuinely separate supply origin.

▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Asset ownership alone therefore does not identify the seller responsible for every historical product, warranty or customer order. Renewals should establish the contracting entity, rights to the named offering and responsibility for delivery and claims.

Before closing, Ingevity described an expected dependence on Mainstream for TOFA and other refinery products. ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪

[redacted] Buyers seeking physical redundancy should not count legacy Ingevity and successor Mainstream references as independent sources of the same transferred refinery output.

Evidence: [E815], [E824], [E76], [E164] Mainstream Pine Products, LLC

Evidence: [E832], [E835], [E78], [E161], [E165], [E731], [E730] Company verification: Company

17.3. Forchem Oyj

[redacted] The April 2026 FOR5 document expressly classifies it as TOFA and identifies metalworking fluids, oilfield chemicals, soaps, cleaners and alkyd resins as potential applications. This provides a concrete comparison across Low-Rosin TOFA and Higher-Rosin TOFA requirements without treating FOR5 as a neighboring tall-oil category.

[redacted] FOR2X's cold-performance positioning remains a supplier claim, while the FOR5 documentation disclaims suitability warranties. Procurement should preserve the approved grade identity when comparing alternatives and separate advertised differentiation from the buyer's authority to approve a change.

[redacted] A buyer requiring certification transfer should obtain documentation valid for the delivery period and confirmation that the named TOFA offering and transaction claim are covered, rather than relying on a general certification statement. A sale without certification transfer is a different offer and is suitable only where the purchaser accepts that basis.

Evidence: [E580], [E606], [E599], [E591], [E592] Forchem Oyj

Evidence: [E545], [E546], [E551], [E552], [E564], [E565], [E785], [E900] Company verification: Company

17.4. Fintoil

Fintoil is an operating Hamina participant with a mixed fuel and chemical outlet model, not merely an announced refinery project. Its FinFA family expressly includes TOFA, crude fatty acid and distilled tall oil. [redacted]

Fintoil lists separate Biochemicals and Biofuels sales responsibilities, giving chemical purchasers a commercial route distinct from fuel-market inquiries. A chemical buyer should request an explicitly identified TOFA offer, the responsible selling entity and a delivery

commitment rather than infer product availability from FinFA customer references. ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■

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Evidence: [E122], [E117], [E851] Fintoil

Evidence: [E126], [E128], [E120], [E850], [E852], [E340], [E341] Company verification: Company

17.5. Harima Chemicals Group, Inc.

Harima expressly includes tall oil fatty acids in its commercial Resins and Tall Oil Products inquiry category. Its February xx.xx 2025, certification announcement describes a cross-border affiliate chain: Harima USA procures crude tall oil from U.S. paper mills and transports it to Japan; Harima M.I.■■ ■■ ■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■

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Evidence: [E646], [E634] Harima Chemicals Group, Inc.

Evidence: [E641], [E648], [E635], [E651], [E650] Company verification: Company

17.6. DRT

DRT markets Resinoline BD xx.xx as a low-rosin tall-oil fatty-acid offering in its coatings and construction portfolio. ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■ ■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■ The dsm-firmenich business page identifies DRT's integration into the group; that affiliation does not, by itself, identify the legal seller responsible for an individual TOFA contract.

DRT's documented channel organization is territorial rather than universally interchangeable. Agreements announced in 2019, effective October xx.xx 2019, assigned Quimidroga the TOFA

relationship for Spain, Portugal and Northern Africa, while Azelis's agreement covered Europe excluding Spain and Portugal. [redacted]

A buyer can use those named relationships to direct an inquiry, but should obtain principal confirmation of the distributor, territory, grade and accountable contracting entity before relying on the route. [redacted] The distinction is between access to a DRT product and authority to sell it in the buyer's location, not between additional independent production sources.

Evidence: [E526], [E517], [E434], [E528], [E770] DRT

Evidence: [E518], [E435], [E527], [E521], [E523], [E522], [E759], [E524], [E525], [E520] Company verification: Company

17.7. Univar Solutions

[redacted] These are potential fulfillment capabilities, not evidence that every named product is stocked or deliverable at every destination. Performance Blends also require their own accepted product identity rather than presumed equivalence to a named SYLFAT grade.

The distributor route is commercially useful when Univar undertakes a delivery or packaging responsibility missing from the proposed direct offer. Its exclusivity wording does not define worldwide territorial rights. [redacted]

Evidence: [E879], [E292] Univar Solutions

Evidence: [E767], [E765], [E766], [E82], [E885], [E884], [E769], [E768], [E886] Company verification: Company

17.8. Ingevity Corporation

[redacted] The pavement portfolio includes Evotherm warm-mix additives and Indulin emulsifiers, establishing downstream offerings rather than the TOFA content of each brand. The June 2026 filing identifies the retained Pavement Technologies business after the Industrial Specialties divestiture.

This makes Ingevity a documented raw-material prospect for TOFA suppliers, distinct from a contractor or public authority purchasing finished pavement products. Account targeting should follow the entity controlling the TOFA purchase and its grade-acceptance requirements, rather than assume that every downstream pavement customer buys the raw material. ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

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Evidence: [E803], [E834], [E162], [E697] Ingevity Corporation

Evidence: [E825], [E828], [E160], [E163], [E799], [E800], [E77] Company verification: Company

17.9. Quadra

▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ The L5 entry also advertises bulk, drum and tote packaging. These listings identify offerings to discuss with Quadra, not confirmed inventory or binding destination-level delivery commitments.

▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ That wider organizational footprint does not establish U.S. availability for the Canadian TOFA listings or Quadra-owned TOFA production. Both grades identify the same supplier, so purchasing L5 alongside L1-C would not by itself demonstrate diversification across upstream producers.

▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ The distributor route is commercially useful when its agreed fulfillment responsibilities address a purchasing need; a producer-direct offer meeting the same requirements remains an alternative. Buyers seeking source resilience should obtain producer-level sourcing evidence rather than count separate catalog entries as independent production origins.

Evidence: [E774], [E779], [E266] Quadra

Evidence: [E775], [E778], [E265], [E267], [E268] Company verification: Company

17.10. Henry Franc SAS

▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪

Its agency disclosure leaves delivery and invoicing with producer principals. Its fatty-acids

portfolio identifies Lascaray as a represented producer, and its TOFA page markets TO-xx.xx and TO-xx.xx in Europe through dispatch arrangements associated with Lascaray's Vitoria location and Barcelona logistics platform.

[illegible] This offering-specific condition does not exclude Higher-Rosin TOFA from the study. Advertised Drums, Intermediate Bulk Containers and tank-truck delivery also require confirmation for the named material and destination.

[illegible] TO-xx.xx remains an inquiry route until its purchasing identity is reconciled; catalog inclusion does not authorize substitution. The model should not be selected where the agent itself must act as stocking reseller or credit counterparty.

Evidence: [E664], [E726], [E667], [E670], [E672] Henry Franc SAS

Evidence: [E668], [E673] Company verification: Company

17.11. Surfachem Group Ltd

[illegible] This establishes a supplier-branded TOFA offering, but not the upstream manufacturer's identity. A different commercial label should therefore not be counted as an independently verified production source.

[illegible] A purchaser can request an integrated offer for an accepted SURFAC grade and the required fulfillment service. A producer-direct route remains an alternative where it meets the same obligations without an intermediary relationship.

Contracting identity and delivery assurance require separate confirmation. [illegible] A source-diversification decision additionally requires confirmation of the upstream producer and relevant production-site ownership.

Evidence: [E330], [E328], [E332] Surfachem Group Ltd

Evidence: [E112], [E113], [E326], [E327], [E333], [E334], [E335] Company verification: Company

18. Companies Covered

Table 374. Global Tall Oil Fatty Acids Market, Companies Covered

Company
Adeps Lanae
AECI Specialty Chemicals
Aik Moh Group
Al-Riaz Agencies Private Limited
Allchital
Andercol
Arkem Kimya
Ataman Kimya A.Ş.
Azelis
Banyan Kimya
Barentz
Betakim Tekstil Sanayi ve Ticaret Limited Şirketi
BIECO
BMD Materials
Carroux Handelsgesellschaft mbH
Catalynt Solutions, Inc.
Cestoil Chemical Inc.
Challenger Avenue (M) Sdn Bhd
Chem Global Sdn Bhd
Chemaxa
ChemCeed
Chemical Products And Services
Chemical Supplies UK
Chemicals Global
Chemiworld Pvt. Ltd.
Chempri
ChemTrade Malaysia
Chilüe (Shanghai) Maoyi Youxian Gongsi
Chuzhou Kanghua Dianzi Cailiao Youxian Gongsi
Corporate Chemical Solutions

Table 374 - continued

Company
COS KİMYA
CountMe Chemicals
Covalent Chemical
Dalian Daping Oil Chemicals Co.,Ltd
Disa Chem Trading
DRT
DUBI CHEM Marine International
DutCH2
Elite Chemicals Kimya San. ve Tic A.Ş.
ER-Khimles
Etilenoaminas de México
Eurostar Chemicals
Fenger Chemicals
Fintoil
Florachem
Forchem Oyj
Foreverest Resources Ltd
FRP Services Europe SARL
Fujian Shaxian Jinlong Xiangliao Huagong Youxian Gongsi
Fujian Shaxian SongChuan Chemical
G.C. Rutteman & Co. B.V.
Gioma Varo
GJ Chemical
GreenChem Industries
Gulf Multi Trading Company L.L.C.
Gustav Heess, S.L.
H Foster 1875 Ltd.
Hampton Chemicals
Hanson Chemicals
Harima Chemicals Group, Inc.
Henry Franc SAS
Ilim Group

Table 374 - continued

Company
Ingevity Corporation
Insta Chemi Private Limited
Insumos a la Industria Química, S.A. de C.V.
International Scientific (Pte) Ltd
Ixom Operations Pty Ltd
Jintenglong Huagong
Kairos Industrial Co. S.A.S.
Kaplan Kimya
KEMNOVA
KORKİMYA
Kraton Corporation
Lascaray S.A.
Mainstream Pine Products, LLC
Manglore Chemical
Miracema-Nuodex
Moller Chemist
Mosselman
MPL Products
Muscat & Barka Business Trading
Neoquim Indústrias Químicas Ltda.
Nordmann
Nufa Sdn Bhd
Obetech Pacific Philippines
OilFactory
OLEO-Chemie
OOO Torgoviy Dom Lesokhimik
OQEMA
Palmer Holland, Inc.
Parchem Fine & Specialty Chemicals
Pasand Chemical
PerFuel
Pine Chemical Group Oy

Table 374 - continued

Company
Poly Tech Egypt
Prakar Organics
Quadra
Quimidroga
Química Prodes Sorein S.A.S.
Redox Limited
Rudnik Química
RusTorgOil
S. R. CHEMICAL
Santosh Polymers
Sarfeegaint Ltd.
Savannah Fine Chemicals (Pty) Ltd
Segezha Group
Shanghai Xiaoyan Keji Youxian Gongsi
Shima Trading Co., Ltd.
Sibles
Silver Fern Chemical
Songchuan Pine Chemicals Co., Ltd
Sunpine AB
Surfachem Group Ltd
Sustainable Commodities
Synthomer
TECNOVA FZE
The Chemical Company
The White Sea and Baltic Company Ltd
TRISTAR (Pty) Ltd
UCY business services & trading GmbH
Unique Fine Product
Univar Solutions
ZEMUR
미성종합물산(주)

Evidence: [E84], [E85], [E545], [E546], [E551], [E552], [E850], [E852], [E340], [E341], [E651], [E650], [E521], [E523], [E522], [E767], [E765], [E766], [E360], [E362], [E361], [E265], [E267], [E268], [E493], [E494], [E263], [E264], [E109], [E110], [E111], [E676], [E679], [E677], [E678], [E112], [E113], [E326], [E327], [E193], [E194], [E83], [E82], [E564], [E565], [E785], [E126], [E128], [E120], [E635], [E641], [E648], [E728], [E729], [E724], [E725], [E312], [E314], [E693], [E695], [E885], [E884], [E757], [E760], [E759], [E436], [E435], [E761], [E763], [E140], [E141], [E161], [E165], [E160], [E163], [E769], [E768], [E48], [E49], [E41], [E42], [E250], [E251], [E248], [E844], [E845], [E358], [E359], [E363], [E364], [E143], [E145], [E775], [E773], [E777], [E778], [E784], [E490], [E492], [E487], [E488], [E179], [E180], [E149], [E151], [E691], [E692], [E688], [E689], [E539], [E540], [E799], [E800], [E279], [E277], [E278], [E35], [E37], [E258], [E260], [E261], [E262], [E232], [E230], [E234], [E233], [E53], [E54], [E50], [E51], [E415], [E416], [E419], [E418], [E473], [E474], [E373], [E372], [E370], [E371], [E668], [E673], [E669], [E674], [E899], [E897], [E900], [E499], [E500], [E94], [E95], [E55], [E57], [E38], [E40], [E623], [E624], [E632], [E633], [E282], [E283], [E28], [E29], [E840], [E842], [E516], [E519], [E515], [E518], [E736], [E737], [E238], [E239], [E246], [E247], [E429], [E428], [E524], [E525], [E853], [E855], [E430], [E432], [E187], [E75], [E73], [E30], [E31], [E531], [E532], [E183], [E32], [E33], [E86], [E91], [E87], [E92], [E242], [E244], [E240], [E241], [E146], [E148], [E184], [E185], [E859], [E860], [E791], [E792], [E508], [E542], [E543], [E733], [E734], [E256], [E257], [E236], [E237], [E156], [E157], [E181], [E182], [E1], [E2], [E437], [E438], [E513], [E514], [E512], [E509], [E510], [E720], [E719], [E722], [E723], [E699], [E700], [E287], [E288], [E289], [E847], [E848], [E226], [E229], [E228], [E838], [E839], [E836], [E271], [E273], [E274], [E495], [E497], [E426], [E424], [E425], [E420], [E421], [E422], [E59], [E61], [E60], [E333], [E334], [E335], [E629], [E630], [E366], [E365], [E369], [E368], [E858], [E856], [E887], [E886], [E506], [E507], [E137], [E139], [E749], [E751], [E114], [E116], [E731], [E730], [E832], [E835], [E825], [E828], [E78], [E77], [E520], [E527], [E529], [E790], [E789], [E786], [E787], [E503], [E505] Company verification: Company

19. Key Experts

[redacted] The roster brings chemical-business leadership and commercial perspectives together with biofuels and paper-industry representation, specialist editorial roles, biorefinery development, and academic expertise in chemistry, coatings, polymers and related materials. These represented roles are relevant to the study's TOFA supply relationships and its materials and fuel applications, while affiliations across Europe, the Americas, Asia, Africa and Australia provide geographic context for a global market.

Table 375. Global Tall Oil Fatty Acids Market, Key Experts

Name	Professional Role	Organization	Country
Alan Sherrard	Editor-in-Chief	Bioenergy International	Sweden
Bjarne Holmbom	Professor Emeritus, Wood and Paper Chemistry	Åbo Akademi University	Finland
Bruce Sithole	Director, Biorefinery Industry Development Facility	Council for Scientific and Industrial Research	South Africa
Dean C. Webster	Professor, Coatings and Polymeric Materials	North Dakota State University	United States
Francisco César Razzolini	Director of Industrial Technology, Innovation, Sustainability and Projects	Klabin	Brazil
George R. Pilcher	Vice President	The ChemQuest Group	United States
Gillian Morris	Director, Chemicals and Materials	Kline & Company	United States
Henrikki Talvitie	Chief Executive Officer	Fintoil	Finland
Hiroshi Nakade	President and Representative Director	Arakawa Chemical Industries, Ltd.	Japan
Jane Molony	Executive Director	Paper Manufacturers Association of South Africa	South Africa
Joel Houston	President	Colin A. Houston & Associates	United States
Johan Tengelin	Chief Executive Officer	SunPine	Sweden
Judith Taylor	Senior Editor, Oleochemicals	ICIS	United States
Jukka Hakola	Chief Commercial Officer	Fintoil	Finland
Kadir Aydın	Professor of Automotive Engineering	Çukurova University	Turkey
Kevin M. Fogarty	Former President and Chief Executive Officer	Kraton Corporation	United States
Laurent Labatut	Former Chief Executive Officer	DRT	France
Lucas Hall	Senior Editor, Oleochemicals	ICIS	United States

Table 375 - continued

Name	Professional Role	Organization	Country
Maiju Helin	Head of Sustainability and Market Development, UPM Biofuels	UPM	Finland
Marcello Boldrini	Chief Executive Officer	Kraton Corporation	United States
Mark D. Soucek	Professor, Polymer Engineering	The University of Akron	United States
Metin Gürü	Professor of Chemical Engineering	Gazi University	Turkey
Michael Malveda	Research Director, Specialty Chemicals	S&P Global	United States
Michael P. Smith	Former Executive Vice President and President, Performance Chemicals	Ingevity	United States
Nadir Godrej	Chairman	Godrej Industries Limited	India
Neil A. Burns	Managing Partner	Neil A. Burns LLC	United States
Nitin Nabar	Former Executive Director and President, Chemicals	Godrej Industries Limited	India
Panu Routasalo	Vice President, UPM Biofuels	UPM	Finland
Peter Abrahamsson	Head of Sustainable Development	Preem	Sweden
Peter W. Hart	Director, Fiber Science and Innovation	WestRock	United States
Raimo Alén	Professor Emeritus, Applied Chemistry	University of Jyväskylä	Finland
Raimond Coneliano	Managing Director and Chief Executive Officer	Redox Limited	Australia
Rich White	President, Performance Chemicals	Ingevity	United States
Stefan Willför	Professor of Wood and Paper Chemistry	Åbo Akademi University	Finland
Sören Eriksson	Refinery Development Engineer	Preem	Sweden
Vijay Mhetar	Senior Vice President and Chief Technology Officer	Kraton Corporation	United States
Vishal Sharma	Executive Director and Chief Executive Officer, Chemicals	Godrej Industries Limited	India
Xavier Noyon	Secretary General	European Biodiesel Board	Belgium
Yoshihiro Hasegawa	President and Representative Director	Harima Chemicals Group, Inc.	Japan
Ángel Álvarez Alberdi	Secretary General	European Waste-based & Advanced Biofuels Association	Belgium

20. Sources & Evidence

Specialty Chemicals - AECI

[E1] AECI's official corporate business page identifies AECI Specialty Chemicals and describes an oleochemicals, lubricants and coatings business.

[E2] This business-identity evidence does not itself establish a current TOFA offer.

Liquid Resins & Additives Product Guide - allnex

[E3] The guide supplies the TOFA relationship for the named SETAL product, not its feedstock supplier or purchase commitments. ([allnex.cn](https://allnex.cn/getmedia/5f88207b-f0b1-xx.xx-af83-2a420d2faf57/730AL_239-LRA-Product-guide-Chinacoat_lowres.pdf.aspx))

[E4] allnex's liquid-resins guide identifies SETAL xx.xx BA-xx.xx as an alkyd based on tall oil fatty acids, establishing the documented downstream conversion role. ([allnex.cn](https://allnex.cn/getmedia/5f88207b-f0b1-xx.xx-af83-2a420d2faf57/730AL_239-LRA-Product-guide-Chinacoat_lowres.pdf.aspx))

Better Carbon Solutions - allnex

[E5] allnex's Better Carbon portfolio lists SETAL xx.xx BA-xx.xx corroborating the named downstream portfolio example without establishing local availability or procurement. ([allnex.com](https://allnex.com/getmedia/xx.xx-fddd-xx.xx-a55e-b324b180d65d/1799_AL-sustainable-brochure_final.pdf.aspx?disposition=attachment))

Supplier Code of Conduct 2023 - allnex

[E6] allnex's 2023 Supplier Code addresses human rights, environmental compliance, confidential information and business records, and reserves termination rights where a supplier cannot demonstrate compliance. ([allnex.com](https://allnex.com/getmedia/340c99ee-63b1-49b4-8c40-2c7b25a59a81/Allnex-Supplier-Code-of-Conduct_final-EN.pdf.aspx))

allnex ESG Report 2021

[E7] The disclosure connects purchasing terms, contract templates and supplier conduct with environmental and social expectations. ([allnex.com](https://allnex.com/getmedia/5f11db7a-1b54-4dbb-a690-2dc19498ba8a/allnex-ESG-2020-2021.pdf?ext=.pdf))

[E8] allnex's 2021 disclosure describes supplier approval and evaluation incorporating commercial, service, environmental and social considerations. It is a dated buyer-policy example, not proof of every current purchase requirement. ([allnex.com](https://allnex.com/getmedia/5f11db7a-1b54-4dbb-a690-2dc19498ba8a/allnex-ESG-2020-2021.pdf?ext=.pdf))

General Terms and Conditions of Purchase of ALLNEX - March 2024, Americas

[E9] Contract-specific bundling qualifies comparisons between bulk and packaged realizations; the model's equal-net-price bridge remains an assumption.

[E10] The March 2024 Americas purchasing terms identify the buyer through the purchase order and require written buyer consent for changes to the goods. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

[E11] The March 2024 Americas terms identify the buyer through its purchase order and require written consent for changes to goods. They are an entity- and jurisdiction-specific buyer-policy example. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

[E12] The March 2024 Americas terms identify the buyer through the purchase order and require written consent for changes to goods, supporting entity-specific authority within regional coordination. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

[E13] The contract example supports checking bundled costs before comparing micro-order realizations; no Jerrycans transaction price is established.

[E14] The dated Americas terms illustrate buyer-controlled changes and bundled delivery-related obligations. Applicability and negotiated deviations must be established for the actual order. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

[E15] The dated purchasing terms illustrate bundled packaging and transport consideration, supporting consistent valuation adjustments rather than an observed format-price differential.

[E16] The purchase order identifies the buyer entity, supporting account attribution without establishing any global purchasing percentage.

[E17] The terms support the pricing-scope caveat and sensitivity analysis, not a measured drum premium.

[E18] Unless the purchase order states otherwise, the terms include transport, packaging and duties in the contractual consideration and require prior written buyer consent for changes. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

[E19] allnex's March 2024 Americas terms identify the buyer through the purchase order and require written consent for goods changes. They also generally include transport, packaging and duties and restrict changes to the agreed consideration. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

[E20] allnex's March 2024 Americas terms require buyer consent for goods changes, generally include delivery-related obligations and constrain adjustments. Applicability depends on the governing order. ([allnex.com](https://allnex.com/getmedia/857341e0-d36f-43ca-ba45-9e11963d921f/General-conditions-of-purchase-xx.xx-2024-English-AMERICAS-FINAL.pdf.aspx))

Liquid Resins & Additives Product Guide - allnex

[E21] A named TOFA-based resin supports resin-conversion account classification, not an observed 2025 purchasing volume.

[E22] The resin offering supports distinguishing a coating manufacturer's resin purchase from a raw-TOFA purchase.

Liquid Resins & Additives Product Guide - allnex, 2019

[E23] SETAL xx.xx BA-xx.xx establishes a documented TOFA-to-resin relationship, not the feedstock supplier, an open purchasing mandate or current local availability. ([allnex.com](https://allnex.com/getmedia/f99123ce-508d-49a7-ae38-bf893b0bb09d/730AL_374-LRA_lr.pdf.aspx?disposition=attachment))

[E24] The 2019 allnex guide identifies SETAL xx.xx BA-xx.xx as an alkyd based on tall oil fatty acids, documenting a conversion-stage commercial role. ([allnex.com](https://allnex.com/getmedia/f99123ce-508d-49a7-ae38-bf893b0bb09d/730AL_374-LRA_lr.pdf.aspx?disposition=attachment))

[E25] The allnex guide, carrying a 2019 copyright, identifies SETAL xx.xx BA-xx.xx as an alkyd based on tall oil fatty acids. It establishes the documented conversion relationship, not current local supply. ([allnex.com](https://allnex.com/getmedia/f99123ce-508d-49a7-ae38-bf893b0bb09d/730AL_374-LRA_lr.pdf.aspx?disposition=attachment))

[E26] The named TOFA-based resin illustrates a resin-manufacturer account distinct from a downstream purchaser of that resin. ([allnex.com](https://allnex.com/getmedia/f99123ce-508d-49a7-ae38-bf893b0bb09d/730AL_374-LRA_lr.pdf.aspx?disposition=attachment))

ER-Khimles - Tall-Oil Products in Russia

[E27] ER-Khimles describes a Kraton-related Russian distribution role; the undated statement does not establish mandate continuity. (archem.ru)

ЭР-Химлес - Талловые продукты в России

[E28] ER-Khimles's substantive business page describes Russian distribution of tall oil fatty acids and rosin products.

[E29] The page describes a Kraton product relationship, without a date or independent confirmation of current mandate continuity.

Oleo Chemicals - Banyan Kimya

[E30] Banyan Kimya lists Tall Oil Fatty Acid (TOFA) among its oleochemical products, separately from crude tall oil.

[E31] The same official page identifies an Istanbul business address and a supply inquiry route.

TOFA, Tall Oil Fatty Acid, Distilled Tall Oil Fatty Acid, Tallol, Tall Oil, Pine Oil Fatty Acid, Tallate Acid, Hydrogenated Tall Oil Fatty Acid, High Oleic Tall Oil Fatty Acid, SYLFAT-2, 61790-12-3

[E32] Betakim's official product catalog advertises TOFA and names SYLFAT xx.xx as an offered product.

[E33] The page identifies BETAKİM TEKSTİL SANAYİ VE TİCARET LİMİTED ŞİRKETİ and office and warehouse addresses in Çorlu, Tekirdağ.

SYLFAT FA1 / SYLFAT FA2 - Barentz Brasil

[E34] Barentz's Brazilian portfolio identifies SYLFAT FA1 and FA2, supporting a branded channel rather than another verified production origin. ([brasil.barentz.com](https://brasil.barentz.com/segmentos/performance-materials/sylfat-fa1-sylfat-fa-xx.xx-acidos-graxos-de-tall-oil/))

[E36] The Brazilian offering identifies paints and lubricants as applications for the named SYLFAT products. ([brasil.barentz.com](https://brasil.barentz.com/segmentos/performance-materials/sylfat-fa1-sylfat-fa-xx.xx-acidos-graxos-de-tall-oil/))

Sylfat FA1 / Sylfat FA 2 - Ácidos graxos de Tall Oil - Barentz - Brasil

[E35] Barentz's Brazilian product page offers SYLFAT FA1 and SYLFAT FA2 as tall-oil fatty acids.

[E37] The page advertises paints and lubricants as commercial application areas and identifies a São Paulo business address.

Surowce chemiczne dla przemysłu i AdBlue® luzem | CHEMAXA

[E38] Chemaxa's business catalog lists TOFA separately from tall oil in its fatty-acid and oleochemical portfolio.

[E40] The catalog provides a Polish business address and business identification information.

Chemical Raw Materials Portfolio - Chemaxa

[E39] Chemaxa's commercial portfolio lists TOFA separately from tall oil. ([chemaxa.com](https://chemaxa.com/pl/))

About Us | ChemCeed | Chippewa Falls, WI

[E41] ChemCeed identifies itself as a woman-owned and minority-owned chemical supplier headquartered in Chippewa Falls, Wisconsin.

[E42] The business page identifies a U.S. stocking network.

Product Feature: Tall Oil Fatty Acid (TOFA) - ChemCeed, December 5, 2017

[E43] Custom packaging availability informs the full denominator; no custom-format sales quantity is disclosed.

[E44] The custom-packaging invitation supports retaining a modeled allowance outside the named children instead of forcing their shares to total xx.xx.

[E45] The dated TOFA offering invites custom packaging beyond its named offerings, motivating a precautionary whole-parent allowance rather than asserting exhaustive coverage.

[E46] The denominator allowance is modeled from possible custom-format activity; this source supplies no Jerrycans numerator or sales weight.

Tall Oil Fatty Acid (TOFA) - ChemCeed

[E47] ChemCeed advertises TOFA in drums, totes and bulk and invites inquiries about other packaging. ([chemceed.com](https://chemceed.com/products/tall-oil-fatty-acid/))

Tall Oil Fatty Acid (TOFA) - Chemical Supplier Distributor ChemCeed

[E48] ChemCeed's official product catalog offers Tall Oil Fatty Acid and provides a commercial quotation route.

[E49] The offering is marketed across industrial categories including lubricants, metalworking, inks, and coatings.

Contact Us - Chemicals Global Industrial Chemical Suppliers

[E50] The official contact page identifies Chemicals Global's address in Pembroke Pines, Florida.

[E51] The page advertises general supplier and distributor coverage across named Latin American countries, supporting a cross-border rather than independently established local-manufacturing role.

Tall Oil Fatty Acid (TOFA) - Chemicals Global

[E52] Chemicals Global's TOFA catalog provides a quotation route without establishing product-specific commitments in every advertised region. ([chemicalsglobal.com](https://chemicalsglobal.com/shop/tall-oil-fatty-acid-tofa/))

TALL OIL FATTY ACID (TOFA)

[E53] Chemicals Global's catalog offers Tall Oil Fatty Acid (TOFA) with a quotation route.

[E54] The same page lists a general distribution footprint encompassing multiple assigned Latin American countries; this is not product-specific proof of current sales in each country.

Tall oil 20% - Chempri

[E55] Chempri has an inspectable official product page titled Tall oil xx.xx%.

[E56] Chempri's named Tall oil xx.xx% offering does not itself resolve equivalence to a particular accepted TOFA grade. ([chempri.com](https://chempri.com/en/product/talloil-xx.xx))

[E57] The retrieved product identity alone does not establish a distinct in-boundary TOFA offering.

Chemical Products - ChemTrade Malaysia

[E58] ChemTrade Malaysia's catalog provides offering context but leaves product terminology and the contracting operator to resolve for a proposed transaction.
([chemtrademalaysia.com](https://chemtrademalaysia.com/products/))

Chemical Products | ChemTrade Malaysia

[E59] The ChemTrade Malaysia catalog includes a Tall Oil Fatty Acid listing.

[E60] The inspected page supports an advertised storefront offering, not a verified contracting legal entity or manufacturing role.

[E61] The listing uses TOFA, distilled tall oil fatty acid, and DTO fatty acid terminology together, leaving the precise commercial product boundary unresolved.

Which certification is right for me? - ISCC System Support Centre

[E62] ISCC distinguishes the EU renewable-fuel context of ISCC EU from the industrial and other voluntary purchasing contexts addressed by ISCC PLUS.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-which-certification-is-right-for-me-))

[E63] ISCC distinguishes the EU renewable-fuel context of ISCC EU from the voluntary circular and bio-based industrial context of ISCC PLUS. Scheme choice follows the target purchasing context.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-which-certification-is-right-for-me-))

[E64] ISCC distinguishes the EU renewable-fuel context of ISCC EU from the voluntary circular, bio-based and industrial contexts of ISCC PLUS.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-which-certification-is-right-for-me-))

[E65] Scheme selection follows the target market's requirements, supporting a claim-specific rather than universally certified TOFA proposition.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-which-certification-is-right-for-me-))

Where do I find information on the requirements for mass balance? - ISCC System Support Centre

[E66] ISCC identifies January xx.xx 2027 as the mandatory date for standalone PLUS chain-of-custody requirements, following the transition ending December xx.xx 2026.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-where-do-i-find-information-on-the-requirements-related-to-mass-balance-))

[E67] ISCC states that its standalone PLUS Chain of Custody document becomes mandatory on January xx.xx 2027, following the transition ending December xx.xx 2026.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-where-do-i-find-information-on-the-requirements-related-to-mass-balance-))

[E68] ISCC states that its standalone PLUS chain-of-custody document becomes mandatory on January xx.xx 2027, following the transition ending December xx.xx 2026.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-where-do-i-find-information-on-the-requirements-related-to-mass-balance-))

[E69] ISCC states that standalone PLUS chain-of-custody requirements become mandatory on January xx.xx 2027, following the transition ending December xx.xx 2026.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-where-do-i-find-information-on-the-requirements-related-to-mass-balance-))

[E70] January xx.xx 2027 is a documented contractual transition trigger for affected PLUS transactions, not evidence that any named supplier will lose coverage.
([contact.iscc-system.org](https://contact.iscc-system.org/support/solutions/articles/xx.xx-where-do-i-find-information-on-the-requirements-related-to-mass-balance-))

ISCC System Support Centre - Requirements Related to Mass Balance

[E71] The support centre confirms that standalone PLUS chain-of-custody requirements become mandatory January xx.xx 2027. This is a forecast documentation condition, not proof of higher purchase penetration.

[E72] The transition creates a potential commercial continuity and cost constraint; it does not require every buyer to request a transferred PLUS claim.

Ne aradığını anlatın. Detayına biz bakalım.

[E73] COS KİMYA's official contact page identifies a Bayraklı, İzmir business address.

Tall Oil Fatty Acid (TOFA) - COS KİMYA

[E74] COS KİMYA lists TOFA with a product-specific quotation route. ([coskimya.com.tr](https://coskimya.com.tr/urun/tall-oil-fatty-acid-tofa))

[E75] COS KİMYA lists Tall Oil Fatty Acid (TOFA), CAS xx.xx-xx.xx-xx.xx in its commercial product catalog and provides a quotation route.

Ingevity Corporation Form 10-Q - Quarter Ended September 30, 2025

[E76] Before closing, Ingevity disclosed an expected dependence on Mainstream for TOFA and other refinery products. This establishes an intended relationship, not completed deliveries, named current merchant grades or channel authorization. ([d18rn0p25nwr6d.cloudfront.net](https://d18rn0p25nwr6d.cloudfront.net/CIK-xx.xx/72fc8f82-491f-4c20-a1dc-b5915b02e912.pdf))

Ingevity Corporation - Form 10-Q, quarter ended September 30, 2025

[E77] Ingevity disclosed an anticipated post-closing dependence on Mainstream for TOFA and other refinery products; this is a buyer relationship rather than evidence that Ingevity would remain a merchant TOFA producer.

[E78] The pre-closing filing identifies Mainstream as an expected supplier of TOFA and other refinery products to Ingevity after closing. This supports a specific intended commercial relationship, not observed shipments or current grade availability. ([d18rn0p25nwr6d.cloudfront.net](https://d18rn0p25nwr6d.cloudfront.net/CIK-xx.xx/72fc8f82-491f-4c20-a1dc-b5915b02e912.pdf))

UNIVAR SOLUTIONS SAS - Conditions of Sale, October 2019

[E79] The French terms establish a contrasting contractual allocation of ancillary costs and cost-change exposure; they are not a universal TOFA contracting standard. ([discover.univarsolutions.com](https://discover.univarsolutions.com/assets/files/EMEA/France/ENG/2019-xx.xx-xx.xx-Sale-France-ENGLISH-FINAL-CLEAN.pdf))

[E80] The October 2019 French sales terms separate delivery, packaging and applicable duties from the stated commercial consideration and provide renegotiation and possible termination when increased costs make performance excessively onerous. These are dated entity-specific terms. ([discover.univarsolutions.com](https://discover.univarsolutions.com/assets/files/EMEA/France/ENG/2019-xx.xx-xx.xx-Sale-France-ENGLISH-FINAL-CLEAN.pdf))

[E81] Univar Solutions SAS's October 2019 French terms separate delivery and packaging charges and provide renegotiation and possible termination where cost increases make performance excessively onerous. These are dated entity-specific provisions. ([discover.univarsolutions.com](https://discover.univarsolutions.com/assets/files/EMEA/France/ENG/2019-xx.xx-xx.xx-Sale-France-ENGLISH-FINAL-CLEAN.pdf))

Kraton Distributor | Univar Solutions

[E82] Univar publicly presents itself as a Kraton distributor and lists SYLFAT tall oil fatty acids in that relationship.

[E83] Univar's Kraton distributor page lists SYLFAT TOFA among the represented supplier's products.

Information | Who We Are | DL Chemical

[E84] DL Chemical identifies Kraton as an acquired subsidiary and records the acquisition in 2022.

[E85] The business page identifies Kraton's operating network, supporting subsidiary-level reporting rather than a separate DL Chemical candidate.

Tall Oil Fatty Acid | DUBI CHEM

[E86] DUBI CHEM advertises Tall Oil Fatty Acid through an official commercial product page.

[E87] DUBI CHEM advertises Tall Oil Fatty Acid under product code RXSOL-xx.xx-2043-xx.xx.

[E91] The page identifies DUBI CHEM Marine International and a Fujairah, United Arab Emirates business address.

[E92] The product page names DUBI CHEM Marine International and includes Kenya in its global supply-and-location network, without establishing product-specific Kenyan stock.

Tall Oil Fatty Acid - DUBI CHEM

[E88] DUBI CHEM markets a RXSOL TOFA offering; the brand association does not independently settle ownership or manufacturing origin. ([dubichem.com](https://dubichem.com/node/xx.xx))

[E89] DUBI CHEM publishes a named TOFA offering through its UAE business; the offering does not establish region-wide delivery commitments or feedstock origin. ([dubichem.com](https://dubichem.com/node/xx.xx))

[E90] Named TOFA offering supports a UAE commercial inquiry route, not sales volume or region-wide demand.

Tall Oil Fatty Acid (TOFA) - DutCH2

[E93] DutCH2 maintains a specific industrial TOFA product page supporting a portfolio-based inquiry. ([dutch2.com](https://dutch2.com/tall-oil-fatty-acid-tofa-industrial/))

Natural Products | Oleochemicals: Tall Oil Fatty Acid (TOFA) | DutCH2

[E94] DutCH2 maintains a specific industrial tall oil fatty acid commercial product page.

[E95] The page identifies DutCH2 as a Netherlands-based chemical supplier and gives a Purmerend address.

Automating Product Carbon Footprint Calculation - allnex ECOWISE CHOICE

[E96] allnex describes a product-carbon-footprint initiative begun in 2022 and pilot implementation in 2023, using supplier information and estimates to address data gaps. This supports a documented reporting initiative, not universal TOFA environmental superiority.
([ecowise-choice.com](https://ecowise-choice.com/news/product-carbon-footprint/))

Tall Oil Fatty Acid 1.5-2.5 (CAS No. 61790-12-3) - Nantong Kanghua Chemical Co., Ltd

[E97] IBC packaging is expressly offered separately from conventional drums and transport-tank bulk. ([en.kanghuachem.com](https://en.kanghuachem.com/prod_view.aspx?id=xx.xx&nid=xx.xx&typeid=xx.xx))

[E98] Plastic and steel drums are expressly offered for the named TOFA product. ([en.kanghuachem.com](https://en.kanghuachem.com/prod_view.aspx?id=xx.xx&nid=xx.xx&typeid=xx.xx))

[E99] Tank trucks and ISO tanks are expressly offered as bulk delivery formats for the named TOFA product. ([en.kanghuachem.com](https://en.kanghuachem.com/prod_view.aspx?id=xx.xx&nid=xx.xx&typeid=xx.xx))

[E100] The company's identified TOFA offering separately lists IBC packaging, conventional plastic or steel drums, and tank-truck or ISO-tank bulk delivery. Its published product identity is consistent with the working TOFA boundary. These are offering facts, not global format shares.
([en.kanghuachem.com](https://en.kanghuachem.com/prod_view.aspx?id=xx.xx&nid=xx.xx&typeid=xx.xx))

European Commission - Voluntary Schemes

[E101] Alternative recognized schemes demonstrate why non-ISCC fuel activity must not automatically be classified as Sales Without Certification Transfer.

[E102] The Commission identifies multiple recognized fuel-certification routes. This supports retaining a bounded alternative-scheme allowance instead of assuming ISCC EU captures every certified fuel transaction; it does not establish the assumed xx.xx%.

Registering chemicals (REACH) - Your Europe

[E103] EU guidance describes role-specific REACH and supply-chain information obligations, supporting a shared EU framework rather than EMEA-wide clearance.
([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/chemicals-and-hazardous-substances/registering-chemicals-reach/index_en.htm))

[E104] EU guidance distinguishes manufacturers, importers, distributors and downstream users and describes registration-related and supply-chain information responsibilities where applicable.
([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/chemicals-and-hazardous-substances/registering-chemicals-reach/index_en.htm))

[E105] EU guidance distinguishes manufacturers, importers, distributors and downstream users and their applicable chemical-access and supply-chain information responsibilities.
([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/chemicals-and-hazardous-substances/registering-chemicals-reach/index_en.htm))

[E106] Official EU guidance describes applicable registration, safety-information and covered-use responsibilities for chemical supply-chain participants.

([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/chemicals-and-hazardous-substances/registering-chemicals-reach/index_en.htm))

[E107] The guidance distinguishes obligations by business role, supporting a separate chemical-compliance assessment rather than reliance on a sustainability designation. ([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/chemicals-and-hazardous-substances/registering-chemicals-reach/index_en.htm))

[E108] The guidance supports assessing applicable obligations for the actual material and business role; it does not provide supplier-specific TOFA clearance. ([europa.eu](https://europa.eu/youreurope/business/product-rules-compliance/chemicals-and-hazardous-substances/registering-chemicals-reach/index_en.htm))

H FOSTER 1875 LIMITED overview - Find and update company information - GOV.UK

[E109] Companies House identifies H FOSTER xx.xx LIMITED, company number xx.xx as active.

[E110] The inspected record includes accounts through November xx.xx 2025 and a confirmation statement dated June xx.xx 2026.

[E111] The record identifies chemical wholesaling among its registered business activities.

SURFACHEM GROUP LIMITED overview - Find and update company information - GOV.UK

[E112] Companies House identifies SURFACHEM GROUP LIMITED, company number xx.xx as active.

[E113] The registered office matches the identity disclosed in Surfachem's commercial materials, supporting the protected group-level reporting identity.

PINE CHEMICAL GROUP OY personal appointments - Find and update company information - GOV.UK

[E114] A historical director record identifies Pine Chemical Group Oy as registered in Finland under number xx.xx-xx.xx.

[E116] The recorded appointment and resignation occurred in 2013; this does not establish current Finnish operating status.

Pine Chemical Group Oy - Companies House Appointments

[E115] The Pine Chemical Group Oy appointments record concerns historical registry activity, not a current TOFA commercial offering. ([find-and-update.company-information.service.gov.uk](https://find-and-update.company-information.service.gov.uk/officers/7lhcsb8UUa9x50WaYmYDwZ60Pc8/appointments))

Contacts - Fintoil

[E117] Fintoil lists separate Biochemicals and Biofuels sales responsibilities alongside supply-chain and customer-service roles. This establishes commercial inquiry routes, not grade-specific supply obligations. ([fintoil.com](https://fintoil.com/en/contacts/))

[E118] Fintoil lists separate Biochemicals and Biofuels sales responsibilities, establishing a chemical-buyer inquiry route without guaranteeing a particular offering or delivery. ([fintoil.com](https://fintoil.com/en/contacts/))

FinFA - Fatty Acids and Distilled Tall Oils - Fintoil

[E119] Fintoil describes fuel customers for a combined TOFA/CFA/DTO family, supporting commercial relevance while leaving qualifying TOFA purchases unresolved. ([fintoil.com](https://fintoil.com/en/finfa-fatty-acids-and-distilled-tall-oils/))

Fintoil’s products and their end-uses - Fintoil

[E120] Advertised buyer uses include renewable fuels, oilfield chemicals, lubricants, and mining.

[E126] Fintoil's official FinFA family expressly includes Tall Oil Fatty Acid.

[E128] The page distinguishes TOFA/CFA product listings from DTO listings.

Fintoil’s products and their end-uses

[E121] FinFA includes TOFA, CFA and DTO, supporting exclusion of unallocated family revenue from the numerator. ([fintoil.com](https://fintoil.com/en/fintoil-products/))

Fintoil's Products and Their End-Uses

[E122] FinFA includes TOFA, CFA and DTO; FinFA xx.xx and FinFA xx.xx are labeled TOFA/CFA, separately from DTO listings. Advertised fuel and chemical uses concern the family and do not establish a particular TOFA customer commitment. ([fintoil.com](https://fintoil.com/en/fintoil-products/))

[E123] Fintoil's FinFA family expressly includes TOFA, CFA and DTO; family-wide customer descriptions do not identify a particular TOFA commitment. ([fintoil.com](https://fintoil.com/en/fintoil-products/))

[E124] Fintoil's FinFA family includes TOFA, CFA and DTO and describes both fuel and chemical uses. Family-level participation does not establish a named TOFA allocation commitment. ([fintoil.com](https://fintoil.com/en/fintoil-products/))

[E125] Fintoil's FinFA family includes TOFA, CFA and DTO and describes fuel and chemical customer settings. Family-level participation does not establish a named TOFA allocation commitment. ([fintoil.com](https://fintoil.com/en/fintoil-products/))

[E127] The mixed FinFA portfolio supports retaining product-attribution and outlet-allocation conditions when interpreting financing developments. ([fintoil.com](https://fintoil.com/en/fintoil-products/))

Fintoil - Certified Fantastic News

[E129] Fintoil's announcement identifies ISCC EU certification and fatty-acid commercial supply. It establishes scheme availability, not the modeled qualifying TOFA tonnage or transfer fraction.

[E130] The announcement also identifies ISCC PLUS certification. Continued availability in the forecast is an explicit assumption, not an observed 2032 fact.

Fintoil - FinFA 8 Crude Fatty Acid Product Sheet, April 25, 2025

[E131] The April xx.xx 2025 FinFA xx.xx sheet identifies crude fatty acid and does not establish the captured minimum fatty-acid threshold; it supports excluding automatic attribution of the full mixed portfolio.

Fintoil - FinFA 5 Tall Oil Fatty Acid Product Sheet, April 25, 2024

[E132] FinFA xx.xx's April xx.xx 2024 sheet gives typical fatty acids of xx.xx% and rosin of xx.xx%, supporting conditional higher-band attribution. Its broader sales specification does not prove every shipment qualifies.

Fintoil Interim Unaudited Report - Q4 2025

[E133] Calendar-2025 gross revenue of EUR xx.xx and logistics of EUR xx.xx support a producer-net financial calibration, subject to an assumed qualifying TOFA portion.

[E134] Reported revenue and pricing conditions support the common-realization calibration and its limitations, not an observed no-transfer percentage.

[E135] The financial comparison constrains commercial scale. Strong fatty-acid demand alongside flat pricing challenges automatic price-premium assumptions; the report does not disclose PLUS shares.

Fintoil Hamina Oy - Quarterly Financial Statements, 2025 Q4

[E136] The unaudited statements report EUR xx.xx gross revenue and EUR xx.xx after logistics for 2025; the qualifying TOFA portion is not disclosed. ([fintoil.com](https://fintoil.com/wp-content/uploads/2026/xx.xx/Q-Rap-2025-Q4.pdf))

Your Trusted Dimer and Trimer Acid Supplier - Florachem

[E137] Advertises a dimer and trimer acid supplier portfolio.

[E139] The inspected record establishes an adjacent commercial role, not a standalone TOFA offering.

Dimer and Trimer Acids - Florachem

[E138] Florachem's inspected portfolio establishes dimer and trimer acid activity, not a standalone raw-TOFA offering. ([florachem.com](https://florachem.com/products/dimer-trimer-acids/))

Tall Oil Fatty Acid - Foreverest Resources Ltd

[E140] Foreverest Resources Ltd publicly offers Tall Oil Fatty Acid in three named commercial grades.

[E141] The product page lists industrial applications and provides a commercial quotation route.

The Economic Agreement Between the GCC States

[E142] The GCC Economic Agreement provides common customs arrangements and a single entry point while retaining rules concerning prohibited and restricted goods. TOFA transaction clearance is a separate question. ([gcc-sg.org](https://gcc-sg.org/en/MediaCenter/DigitalLibrary/Documents/xx.xx.pdf))

Tall Oil Fatty Acid LFA Supplier and Distributor | Buy Tall Oil Fatty Acid LFA Bulk, Drums, LTL at GJ Chemical

[E143] GJ Chemical expressly identifies itself as a supplier and distributor of Tall Oil Fatty Acid LFA.

[E145] The product page provides a commercial quotation route; it does not by itself resolve the regional contracting entity.

Tall Oil Fatty Acid LFA - GJ Chemical

[E144] GJ Chemical identifies itself as supplier and distributor of Tall Oil Fatty Acid LFA through bulk and smaller delivery arrangements. ([gjchemical.com](https://gjchemical.com/chemical-distributor/tall-oil-fatty-acid-lfa-supplier-xx.xx.aspx))

Tall Oil Fatty Acid Supplier in UAE | Bulk Supply - Gulf Multi Trading | Gulf Multi Trading Company LLC

[E146] Gulf Multi Trading Company L.L.C. offers Tall Oil Fatty Acid through a specific UAE commercial product page.

[E148] The page describes supply to industrial chemical manufacturers across the GCC and states that availability is subject to inquiry.

Tall Oil Fatty Acid - Gulf Multi Trading Company

[E147] Gulf Multi Trading makes packing, availability and delivery confirmation dependent on the sales inquiry. ([gulfmultitrading.com](https://gulfmultitrading.com/product/tall-oil-fatty-acid))

Animal Nutrition & Feed Additives Supplier | USA & Canada

[E149] Hanson Chemicals' official offering page lists Tall Oil Fatty Acid.

[E151] The page is titled for USA and Canada supply, establishing advertised regional targeting rather than verified local sales or inventory.

Animal Nutrition Product List - Hanson Chemicals

[E150] Hanson's application-category page lists TOFA; category placement does not establish approval for every buyer setting. ([hansonchemicals.com](https://hansonchemicals.com/animal-nutrition/))

ISCC Summary Audit Report - Forchem OYJ, issued September 16, 2025

[E152] The September xx.xx 2025 audit identifies ISCC EU, mass-balance custody and CTO-derived fatty-acid output scope. Sustainable-material amounts are not disclosed.

[E153] The same audit identifies ISCC PLUS and no other sustainability scheme at the audited site. This supports availability and the narrow supplier treatment, not transferred sales quantities.

G7 Canada 2025 Comprehensive Accountability Report

[E154] The G7 accountability report addresses responsible global supply chains and labor, social and environmental standards; these policy commitments are distinct from customer-specific TOFA requirements. ([international.canada.ca](https://international.canada.ca/en/global-affairs/corporate/reports/g7-2025-accountability-report))

AECI Interim Financial Results - Half-Year Ended June 30, 2020

[E155] AECI's disclosure for the half-year ended June xx.xx 2020 records closure of IOP's tall-oil distillation operations. ([investor.aeciworld.com](https://investor.aeciworld.com/pdf/interim-results/2020/interim-results-2020.pdf))

AECI Summarised Unaudited Consolidated Interim Financial Results for the Half-Year Ended 30 June 2020

[E156] AECI's financial disclosure for the half-year ended June xx.xx 2020 records closure of IOP's tall-oil distillation operations.

[E157] The disclosure records integration of IOP and other chemicals businesses into AECI Specialty Chemicals and AECI Industrial Chemicals.

Ingevity announces agreement to sell North Charleston crude tall oil refinery and majority of Industrial Specialties product line to Mainstream Pine Products

[E158] The September xx.xx 2025 announcement contemplated separate supply, toll-manufacturing and operating-service agreements with Mainstream. It was an announcement of intended arrangements, not independent proof of each agreement's implementation. ([ir.ingevity.com](https://ir.ingevity.com/news-releases/news-releases-details/2025/Ingevity-announces-agreement-to-sell-North-Charleston-crude-tall-oil-refinery-and-majority-of-Industrial-Specialties-product-line-to-Mainstream-Pine-Products/default.aspx))

[E159] The planned intercompany agreements support examining individual service responsibilities during the ownership transition. ([ir.ingevity.com](https://ir.ingevity.com/news-releases/news-releases-details/2025/Ingevity-announces-agreement-to-sell-North-Charleston-crude-tall-oil-refinery-and-majority-of-Industrial-Specialties-product-line-to-Mainstream-Pine-Products/default.aspx))

Ingevity announces successful completion of sale of North Charleston crude tall oil refinery and majority of Industrial Specialties product line

[E160] Ingevity announced completion of the business sale on January xx.xx 2026.

[E161] Ingevity announced that Mainstream Pine Products, LLC completed its acquisition of the North Charleston CTO refinery assets and most Industrial Specialties products on January xx.xx 2026.

[E163] Ingevity states that it exited its remaining CTO-based product lines while retaining specified other businesses.

[E165] The announcement establishes an acquired-business role, but does not enumerate Mainstream's current TOFA grades.

Ingevity Announces Successful Completion of Sale of North Charleston Crude Tall Oil Refinery and Majority of Industrial Specialties Product Line

[E162] Ingevity described an exit from remaining CTO-based product lines while retaining Pavement Technologies and specified other products. This challenges an assumed continuing merchant-producer role but does not independently settle every possible residual external TOFA arrangement. ([ir.ingevity.com](https://ir.ingevity.com/news-releases/news-releases-details/2026/Ingevity-announces-successful-completion-of-sale-of-North-Charleston-crude-tall-oil-refinery-and-majority-of-Industrial-Specialties-product-line/default.aspx))

[E164] Ingevity's January xx.xx 2026, announcement confirms the sale to Mainstream and identifies the transferred refinery as co-located with Ingevity's facility. The filing separately establishes the January xx.xx closing date. ([ir.ingevity.com](https://ir.ingevity.com/news-releases/news-releases-details/2026/Ingevity-announces-successful-completion-of-sale-of-North-Charleston-crude-tall-oil-refinery-and-majority-of-Industrial-Specialties-product-line/default.aspx))

ISCC EU - ISCC System

[E166] ISCC EU addresses sustainability and greenhouse-gas requirements for renewable fuels and biomass energy. This establishes the scheme's purchasing context, not a particular TOFA transaction's eligibility. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-eu/))

ISCC EU

[E167] The scheme owner's official page identifies ISCC EU as a separately named certification program, supporting its preservation as a distinct transaction-claim category rather than a generic sustainability label. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-eu/))

ISCC PLUS certification

[E168] A gap in required site coverage creates a claim-continuity risk; transport operators are not themselves required to be certified. The disruption scenario is conditional. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E169] Applicable site coverage must support the promised claim; producer-level certification alone does not settle the whole transaction. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E170] ISCC PLUS describes applicable site-based certification across the chain and excludes transport operators from certification requirements. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E171] ISCC PLUS describes certification across relevant supply-chain elements and site-based certification, supporting the need to verify more than the producer alone. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E172] ISCC PLUS describes site-based certification across applicable supply-chain elements and excludes transport operators from certification requirements. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E173] ISCC PLUS describes site-based certification across relevant supply-chain elements, including traders with storage, while exempting transport operators from certification. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E174] ISCC PLUS is voluntary and permits different custody approaches. Its relevance depends on the buyer's required claim and applicable chain coverage. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E175] ISCC PLUS is voluntary and recognizes multiple custody approaches. Its overview describes applicable site certification and excludes transport operators from certification requirements. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E176] ISCC PLUS is voluntary and supports traceable sustainability claims; its commercial relevance depends on the buyer's requirement and applicable chain coverage. ([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

[E177] The scheme owner's official page separately identifies ISCC PLUS certification, supporting a named claim category distinct from ISCC EU.
([iscc-system.org](https://iscc-system.org/certification/certification-schemes/iscc-plus/))

ISCC - How ISCC PLUS Achieved 6,000 Valid Certificates, July 24, 2025

[E178] The scheme owner reports more than xx.xx tonnes of outgoing PLUS materials for the referenced certification period. This supports commercial infrastructure availability, not a TOFA sales weight or forecast adoption percentage.

Canadian Trademarks Details: ProtectMG - 2214061 - Canadian Trademarks Database

[E179] The Canadian Intellectual Property Office record identifies CESTOIL CHEMICAL INC. as a registered trademark owner at a Courtice, Ontario address.

[E180] The record establishes a legal-name and address link, not TOFA authorization or sales.

International Trade Administration Commission of South Africa Annual Report 2023/24

[E181] ITAC's 2023/xx.xx annual report identifies IOP, also described as Speciality Chemicals, as the former local TOFA manufacturer whose Durban plant closed in 2020.

[E182] The report's SACU manufacturing finding is historical and does not establish current AECI TOFA trading activity.

Kaplan Kimya product catalog

[E183] Kaplan Kimya's officially hosted product catalog lists Tall Oil Fatty Acid (TOFA).

Uncategorized - KEMNOVA

[E184] KEMNOVA's official product catalog lists Tall Oil Fatty Acid (TOFA) with a quotation route.

[E185] The catalog publishes a Jebel Ali Freezone Authority, Dubai address; it does not independently establish a registered UAE legal entity.

TOFA 185 Tall Oil Fatty Acid: Metalworking TDS - KORKİMYA

[E186] The supplier advertises TOFA xx.xx bulk consignments of xx.xx-xx.xx net tonnes. The xx.xx-tonne midpoint anchors the model's scalable bulk-dispatch equivalent; use for 2025 is a backcasting assumption.

TOFA Tall Oil Fatty Acid 180 / 185: Supply and TDS | KORKİMYA

[E187] KORKİMYA's official commercial supply page advertises TOFA xx.xx and TOFA xx.xx.

Fuel Additives - Kraton

[E188] Kraton advertises SYLFAT TOFA for diesel lubricity, establishing an additive proposition distinct from renewable-fuel feedstock capability. ([kraton.com](https://kraton.com/markets/fuel-additives/))

[E189] Kraton markets SYLFAT TOFA for lubricity in ultra-low-sulfur diesel. The evidence establishes a fuel-additive proposition, not approval of every grade or an independently verified performance advantage.
([kraton.com](https://kraton.com/markets/fuel-additives/))

[E190] Kraton markets SYLFAT TOFA for ultra-low-sulfur diesel lubricity and describes low-temperature handling differentiation. This is an offering claim, not customer-specific acceptance.
([kraton.com](https://kraton.com/markets/fuel-additives/))

[E191] The company's TOFA fuel-additive offering supports a narrow-boundary commercial premise; it does not quantify fuel-producer feedstock purchases.

[E192] The fuel-additive offering supports distinguishing additive purchasing from a fuel manufacturer's feedstock mandate; it does not identify a specific buyer. ([kraton.com](https://kraton.com/markets/fuel-additives/))

Sustainable Engineered Polymers in Oilfield Chemicals | Kraton

[E193] Kraton's official oilfield portfolio states that it manufactures tall oil fatty acids.

[E194] The portfolio names SYLFAT tall oil fatty acids and identifies oilfield applications.

Kraton Corporation Announces Price Increase for Tall Oil Fatty Acids in the EMEA

[E195] The November xx.xx 2025 announcement makes the EMEA TOFA price increase effective January xx.xx 2026, preventing its inclusion as a 2025 realization uplift.
([kraton.com](https://kraton.com/newsroom/tofa-price-increase-in-emea/))

SYLFAT Tall Oil Fatty Acid - Kraton

[E196] Kraton advertises SYLFAT TOFA and multiple named grades for industrial applications; this establishes an offering record, not local stock. ([kraton.com](https://kraton.com/products/sylfat/))

[E197] Kraton's SYLFAT portfolio establishes branded TOFA offerings and advertised industrial applications, not buyer-approved interchangeability. ([kraton.com](https://kraton.com/products/sylfat/))

[E198] Kraton's SYLFAT portfolio lists FA2, 2LT, FA1 and xx.xx and identifies industrial applications including coatings, lubricants, metalworking fluids, mining and oilfield chemicals. These are advertised offerings and applications, not purchaser approvals. ([kraton.com](https://kraton.com/products/sylfat/))

[E200] The SYLFAT portfolio supports the existence of differentiated TOFA offerings without proving equivalence to another supplier's grades. ([kraton.com](https://kraton.com/products/sylfat/))

SYLFAT TOFA for Industrial Applications - Kraton Corporation

[E199] The SYLFAT portfolio supports TOFA offering attribution; it does not disclose sales quantities or establish purchaser acceptance. ([kraton.com](https://kraton.com/products/sylfat/))

Kraton Oleochemical and Rosin Product Guide

[E201] Agricultural adjuvants are an advertised TOFA application. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E202] Kraton's guide identifies SYLFAT xx.xx SYLFAT 2LT, and SYLFAT FA2 as TOFA and reports free-rosin values of xx.xx%, xx.xx%, and xx.xx%, respectively. These illustrate the lower band; guide values do not establish every shipment's composition. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E203] Kraton's product guide positions SYLFAT 2LT as a TOFA fuel additive for improving low-sulfur diesel lubricity. This establishes an application proposition, not purchaser adoption. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E204] SYLFAT 2LT is identified as a TOFA grade marketed for diesel-fuel lubricity additives. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E205] TOFA is offered for asphalt emulsions and concrete-related construction applications. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E211] The TOFA column identifies mineral-processing flotation reagents and collectors; this is an advertised supplier application, not independently measured demand. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E212] The TOFA column identifies plasticizers for rubber, distinct from the guide's primary resin destinations. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E213] The TOFA column identifies textiles, but does not establish leather-sector purchasing. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E215] The application matrix's TOFA column identifies mineral processing, rubber plasticizers, construction, textiles and agricultural adjuvants separately from other pine-chemical families. It establishes offering attribution, not buyer awards. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E216] The guide documents a diesel-lubricity purchasing proposition distinct from supplying renewable-fuel feedstock. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E219] The product/application matrix separately identifies TOFA for alkyds, epoxy ester resins and polyamide curing agents. ([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E220] The same guide identifies SYLFAT FA1 as TOFA with a reported free-rosin value of xx.xx%, illustrating an offering on the higher side of the cutoff. The portfolio corroborates category existence, not market exhaustiveness or allocation.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

Kraton Oleochemical and Rosin Product Guide - 2024

[E206] TOFA-specific pigment-wetting applications support the direct-formulation boundary without counting downstream resin sales.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E207] TOFA-specific rubber plasticizer positioning supports category attribution, not an observed purchasing weight.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E208] Textiles appear in the TOFA column; no leather purchasing quantity is established.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E209] The TOFA column distinguishes resin-related offerings from adjacent pine-chemical families.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E210] The TOFA column identifies mineral-processing applications separately from other product families.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E214] The TOFA-specific agricultural-adjuvant entry supports application classification without implying universal product authorization.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E217] The guide identifies a TOFA fuel-additive offering distinct from fuel-feedstock demand.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

[E218] The matrix identifies TOFA construction offerings, corroborating the buyer-spending model's scope.
([kraton.com](https://kraton.com/wp-content/uploads/2024/xx.xx/oleochemical-brochure-interactive-kraton-xx.xx-xx.xx.pdf))

LANXESS - New Sustainable Ion Exchange Resin for Water Softening, April 29, 2024

[E221] The April xx.xx 2024 announcement identifies a TOFA-linked industrial product chain and PLUS-certified site. It establishes an industrial claim pathway but discloses no attributable TOFA purchasing volume.

Tall Oil Fatty Acids (TOFA) - Bulk Supply in Russia and CIS, Lesohimiya

[E222] Lesohimiya explicitly advertises Jerrycans for its TOFA offering and describes delivery across Russia and the CIS. This is an advertised route, not buyer-specific acceptance or a binding delivery commitment.
([lesohimiya.ru](https://lesohimiya.ru/tall_oil_fatty_acids/en))

Tall Oil Fatty Acids (TOFA) 100% - Bulk Supply in Russia and CIS

[E223] The Russia/CIS offering advertises Jerrycans and a general xx.xx-litre minimum order. These constrain a modeled multi-container micro-order scale but do not establish qualifying producer-origin sales or global market share.

[E224] The dedicated TOFA offering names jerrycans alongside drums, IBC totes and tanker trucks. Its displayed information does not explicitly establish the working minimum free-fatty-acid content; the title's xx.xx% wording is not substituted for that missing qualification. This corroborates an advertised format only.
([lesohimiya.ru](https://lesohimiya.ru/tall_oil_fatty_acids/en))

[E225] The supplier's dedicated TOFA page expressly advertises jerrycans alongside drums, IBC totes, and tanker trucks. It establishes an advertised format but not representative global sales or complete qualification against the frozen free-fatty-acid boundary. ([lesohimiya.ru](https://lesohimiya.ru/tall_oil_fatty_acids/en))

Tall Oil Fatty Acid | Manglore Chemical

[E226] Manglore Chemical's official product page offers Tall Oil Fatty Acid.

[E228] The offering establishes a market-facing supply role, not TOFA-specific manufacturing at the company's advertised facilities.

[E229] The page names Indian delivery locations, including Mumbai-area ports and Maharashtra locations.

Tall Oil Fatty Acid - Manglore Chemical

[E227] The Manglore TOFA page uses RXSOL Chemo Pharma International in its commercial footer, leaving seller attribution to reconcile. ([manglorechemical.com](https://manglorechemical.com/product/tall-oil-fatty-acid))

Liacid® 2915 - Miracema-Nuodex

[E230] Liacid xx.xx is classified as distilled tall-oil fatty and rosin acids for industrial lubricants; the page does not establish a distinct narrow-TOFA classification.

[E232] The official Liacid xx.xx page identifies Miracema-Nuodex and a Campinas, São Paulo, Brazil address.

Liacid 2915 - Miracema-Nuodex

[E231] Miracema-Nuodex's Liacid xx.xx product association requires offering-specific classification before comparison with named TOFA grades. ([miracema-nuodex.com.br](https://miracema-nuodex.com.br/produto/liacid-xx.xx/))

Soluções | Miracema-Nuodex

[E233] The listings appear within industrial lubricants and paints/resins portfolios, supporting a commercial offering but not resolving TOFA-versus-DTO attribution.

[E234] The official portfolio lists Liacid xx.xx and Liacid xx.xx under distilled tall-oil fatty and rosin acids.

Artificial Intelligence Risk Management Framework: Generative Artificial Intelligence Profile - NIST AI 600-1

[E235] NIST's voluntary generative-AI profile identifies confidently erroneous outputs, sensitive-information risks, human oversight and verification of output sources as governance considerations. Applying these controls to TOFA commercial information is a bounded recommendation.
([nvlpubs.nist.gov](https://nvlpubs.nist.gov/nistpubs/ai/NIST.AI.xx.xx-xx.xx.pdf))

OIL FACTORY ENG

[E236] OilFactory's official business portfolio includes tall oil fatty acids among its forest-chemical offerings.

[E237] The company separately describes a broader chemical and forestry supply chain reaching Algeria; the page does not identify a TOFA-specific Algerian transaction.

Produkte - Oleochemie : DE

[E238] OLEO-Chemie's official German-language product portfolio lists Tallölfettsäure.

[E239] The product listing establishes an advertised offering, not a verified manufacturing facility or registered contracting identity.

About Oman Chemical | Chemical Company in Barka, Muscat

[E240] Oman Chemical's official business page identifies MBBT's chemical-supply operations in Barka, Oman.

[E241] The page describes UAE and Indian branches; this establishes a stated network connection, not independently verified ownership.

Tall Oil Fatty Acid Supplier in Oman | Oman Chemical

[E242] Oman Chemical advertises RXSOL Tall Oil Fatty Acid under product code RXSOL-xx.xx-2043-xx.xx.

[E244] The same page identifies the business as Muscat & Barka Business Trading and gives an Oman business location.

Tall Oil Fatty Acid Supplier in Oman - Oman Chemical

[E243] Oman Chemical's TOFA offering identifies Muscat & Barka Business Trading and the RXSOL commercial product association. ([omanchem.com](https://omanchem.com/product/Tall-Oil-Fatty-Acid))

Lubricants - Technical Applications DACH - OQEMA

[E245] OQEMA's DACH lubricants brochure establishes broader distribution context, not every proposed TOFA mandate or destination commitment.
([oqema.com](https://oqema.com/uk/en/content/download/xx.xx/file/OQEMA_DACH_Lubricants_25.pdf?inLanguage=eng-GL))

Lubricants - Crafting Sustainable Solutions - Technical Applications DACH

[E246] OQEMA's official DACH lubricants brochure identifies the business as a chemical distributor active across Europe.

[E247] The precise TOFA listing and appropriate selling entity remain unresolved in this checkpoint.

About Us: Parchem Fine & Specialty Chemicals Overview - Parchem

[E248] The company's own business page uses the Parchem Fine & Specialty Chemicals market-facing identity.

Resinoline BD 2 - Parchem

[E249] Parchem lists Resinoline BD xx.xx as tall-oil fatty acids with a quotation route; this does not establish independent production. ([parchem.com](https://parchem.com/chemical-supplier-distributor/resinoline-bd-xx.xx-xx.xx))

RESINOLINE BD 2 (Cas 61790-12-3) - Parchem

[E250] Parchem's official catalog offers RESINOLINE BD xx.xx and expressly identifies the product as tall oil fatty acids.

[E251] The page provides a quotation route and a New Rochelle, New York business address.

Fuel Additive Components - PerFuel Offers

[E252] PerFuel advertises TOFA-based lubricity improvers within a fuel-additive component portfolio; this does not establish an unmodified merchant feedstock offer. ([perfuel.com](https://perfuel.com/our-offers))

Breu Alternativo - Pinus Brasil

[E253] Adjacent rosin-derived alternative informs substitution uncertainty; no adjacent-product revenue is included.

[E254] Pinus Brasil presents Pinusplast xx.xx as a rosin-derived alternative to tall oil fatty acid for alkyd-resin and lubricant applications; buyer-approved interchangeability is not established. ([pinusbrasil.com.br](https://pinusbrasil.com.br/produtos/breu-alternativo/))

Chemical Raw Materials - Poly Tech Egypt

[E255] Poly Tech Egypt lists TOFA separately from distilled tall oil in its chemical raw-materials portfolio. ([polytechagency.com](https://polytechagency.com/products/chemical-raw-materials/))

CHEMICAL RAW MATERIALS - Poly Tech Egypt

[E256] Poly Tech Egypt's official raw-materials catalog separately lists Tall Oil Fatty Acid and Distilled Tall Oil.

[E257] The catalog provides a headquarters address in Haram, Giza, Egypt.

TOFA (Tall Oil Fatty Acids) | QPros

[E258] An official article dated June xx.xx 2026 expressly states that QPros commercializes tall-oil fatty acids.

[E260] The page provides a commercial contact route and discusses industrial application categories without identifying a TOFA manufacturing plant.

TOFA (Tall Oil Fatty Acids) - QPros

[E259] QPros' June xx.xx 2026 article expressly describes commercialization of TOFA, not ownership of a TOFA refinery. ([qpros.co](https://qpros.co/tofa-tall-oil-fatty-acids/))

PROTECCIÓN DE DATOS PERSONALES

[E261] The company's privacy policy expressly identifies Química Prodes Sorein S.A.S. as QPros.

[E262] The document identifies Medellín, Antioquia, as the company's domicile and supplies its business address.

Política del SAGRILAFT

[E263] The April xx.xx 2024 corporate policy expressly names QUIMICA PRODES SOREIN SAS.

[E264] This supports the legal-company identity underlying the separately captured QPros commercial TOFA offering.

Quadra Corporate Overview and Sustainability Report 2024

[E265] Quadra's fiscal 2024 corporate report defines the group as including Quadra Chemicals Ltd. in Canada and Quadra Chemicals Inc. in the United States.

[E267] The report identifies a privately held chemical-distribution business and its operating locations, supporting one group-level Quadra identity.

[E268] The report supplies reporting-level context; the captured Canadian TOFA catalogs separately establish the product-specific channel.

Corporate Overview and Sustainability Report 2024 - Quadra

[E266] The fiscal 2024 report defines Quadra's reporting scope as including Quadra Chemicals Ltd. in Canada and Quadra Chemicals Inc. in the United States and describes its chemical-distribution business. This corporate footprint is distinct from product-specific territorial availability. ([quadragroup.com](https://quadragroup.com/app/uploads/2025/xx.xx/quadra-2024-sustainability-report_en.pdf))

Kraton & Redox Partnership Announcement - Redox

[E269] Redox documents a Kraton TOFA relationship for Australia and New Zealand; continuity and order obligations remain separate questions. ([redox.com](https://redox.com/news/kraton-and-redox-partnership/))

[E270] Redox publishes its Kraton TOFA channel appointment for Australia and New Zealand; continuing authority and individual delivery commitments require confirmation. ([redox.com](https://redox.com/news/kraton-and-redox-partnership/))

[E272] The announced principal relationship supplies an Australasian inquiry route, not blanket country-specific fulfillment assurance. ([redox.com](https://redox.com/news/kraton-and-redox-partnership/))

Kraton & Redox Partnership Announcement | Redox

[E271] Redox's official announcement identifies Redox Limited as Kraton's channel partner for TOFA in Australia and New Zealand.

[E273] The announcement identifies SYLFAT tall oil fatty acids among the represented products.

[E274] The record establishes the announced relationship, not uninterrupted mandate continuity through the present.

Ciclo de Oficinas IPEA - BRICS 2025: Relatório de Pesquisa

[E275] IPEA's June 2025 BRICS workshop report recommends arrangements facilitating local-currency trade. Recommendations do not establish an executable TOFA settlement facility. ([repositorio.ipea.gov.br](https://repositorio.ipea.gov.br/bitstreams/d6c9828f-36a1-4d44-xx.xx-b6b79b104295/download))

Agroquímicos e Fertilizantes - Rudnik

[E276] Rudnik's Brazilian agrochemical and fertilizer portfolio lists tall-oil fatty acid as an offered raw material. ([rudnik.com.br](https://rudnik.com.br/agroquimicos-fertilizantes/))

Agroquímicos e Fertilizantes Rudnik: Soluções para a Agricultura

[E277] The official agrochemicals and fertilizers portfolio lists tall-oil fatty acid as an offered raw material.

[E278] The page identifies Rudnik's location in Cotia, São Paulo, Brazil.

Quem Somos Rudnik: Nossa História e Compromisso

[E279] The official company page identifies Rudnik Química as a supplier and distributor of chemical raw materials, with commerce, importation, and distribution roles.

Catálogo Petroquímicos - Rudnik Química

[E280] Rudnik's catalog lists tall oil fatty acid and identifies its Brazilian location, establishing an offering lead rather than regional fulfillment or manufacturing origin. ([rudnik.com.br](https://rudnik.com.br/wp-content/uploads/2025/xx.xx/PETROQUIMICOS_Rudnik-Quimica.pdf))

Tall Oil Fatty Acids - RusTorgOil

[E281] RusTorgOil has a dedicated TOFA commercial catalog entry; it does not independently establish production ownership. ([rustorgoil.ru](https://rustorgoil.ru/product/lesokhimicheskaya-produktsiya/zhirnye-kisloty/zhirnye-kisloty-tallovogo-masla-zhktm/))

Жирные кислоты таллового масла ЖКТМ купить от производителя - компании РусТоргОйл

[E282] RusTorgOil's official catalog offers tall oil fatty acids for wholesale supply in Russia.

[E283] The company describes itself as a manufacturer and seller, but the page does not independently establish ownership of a TOFA production facility.

Ingevity Corporation 2024 Annual Report

[E284] Ingevity's 2024 annual report states that it exited material long-term crude tall oil contracts and moved to shorter-duration procurement arrangements. ([s23.q4cdn.com](https://s23.q4cdn.com/xx.xx/files/doc_financials/2024/q4/97f597fd-f79f-4f05-93aa-b8e0493a9959.pdf))

[E285] The filing describes pulp-linked crude tall oil supply and competition from other fatty-acid inputs, supporting the upstream and downstream bargaining distinction. ([s23.q4cdn.com](https://s23.q4cdn.com/xx.xx/files/doc_financials/2024/q4/97f597fd-f79f-4f05-93aa-b8e0493a9959.pdf))

Tall Oil Fatty Acid - Santosh Polymers

[E286] Santosh Polymers offers TOFA through a product-specific inquiry page; producer-versus-reseller attribution remains a separate condition. ([santoshpolymers.com](https://santoshpolymers.com/tall-oil-fatty-acid))

Tall Oil Fatty Acid Manufacturers and Suppliers from Kurukshetra

[E287] Santosh Polymers publicly offers Tall Oil Fatty Acid through a wholesale inquiry page.

[E288] The page identifies a Ladwa, Kurukshetra, Haryana, India office location.

[E289] The page lists manufacturer, supplier, and trader roles without establishing which role applies specifically to TOFA.

SYLFAT 2 Tall Oil Fatty Acid Product Data Sheet - September 3, 2025

[E290] Kraton's September 2025 SYLFAT xx.xx document assigns application suitability to the user and refers warranties to the applicable contract or sales terms. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E291] Kraton's September xx.xx 2025 SYLFAT xx.xx document assigns suitability to the user and refers warranties to governing commercial terms. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E292] Kraton's producer documentation lists bulk and packaged SYLFAT xx.xx formats subject to availability. This supports considering a direct offer as an alternative to distribution, conditional on the producer meeting the buyer's requirements. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E293] Producer documentation establishes packaged supply as an alternative to investigate, not an assured direct offer. The economic comparison remains conditional on equivalent accepted obligations. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E294] SYLFAT xx.xx documentation describes low-rosin positioning, light color and color stability, while distinguishing sales specifications from typical properties. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E295] SYLFAT xx.xx documentation lists bulk transport, Intermediate Bulk Containers and steel drums subject to availability, supporting a producer-direct alternative to distributor fulfillment. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E296] SYLFAT xx.xx is presented as low-rosin TOFA with light color, color stability and alkyd-resin applications; these are supplier offering descriptions rather than customer experience results. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E298] The September xx.xx 2025 SYLFAT xx.xx document assigns suitability to the user and lists delivery formats subject to availability. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E299] The September xx.xx 2025 SYLFAT xx.xx document lists bulk transport options, Intermediate Bulk Containers and steel drums, qualified by availability. It does not establish destination-specific fulfillment. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E301] The September xx.xx 2025 document lists tank-based delivery, IBCs and steel drums subject to availability. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E303] The September xx.xx 2025, SYLFAT xx.xx document assigns suitability to the user, refers warranties to applicable commercial terms and lists bulk transport, Intermediate Bulk Containers and steel drums subject to availability. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E304] The document lists bulk and packaged delivery formats subject to availability, supporting destination-specific fulfillment verification rather than a blanket packaging commitment. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E305] The producer document advertises bulk and packaged formats subject to availability, supporting direct supply as an alternative to evaluate rather than an assured commitment. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

[E306] The producer's advertised packaging options do not establish destination-level commitments or purchaser suitability. ([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-xx.xx.pdf))

Kraton - SYLFAT 2 Tall Oil Fatty Acid Product Data Sheet, September 3, 2025

[E297] Steel drums are an advertised producer-level option; their continued availability is counterevidence to assuming complete forecast displacement.

[E300] The September xx.xx 2025 SYLFAT xx.xx document reports xx.xx% typical rosin and a xx.xx% maximum, corroborating base-year low-rosin positioning but not the percentage of sales below the cutoff.

[E302] The September xx.xx 2025 producer document offers tank-based delivery subject to availability, supporting Bulk classification and the first-sale fulfillment premise, not an observed share.

[E307] The same TOFA grade is offered in IBCs subject to availability, supporting a distinct producer-level format and continued-availability modeling.

SYLFAT 2LT Tall Oil Fatty Acid Product Data Sheet - September 3, 2025

[E308] Kraton's September xx.xx 2025 SYLFAT 2LT document advertises a component for lubricity improvers while retaining purchaser responsibility for suitability.
([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-2LT.pdf))

[E309] SYLFAT 2LT's advertised application does not replace purchaser acceptance; the document refers warranties to the applicable commercial agreement.
([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-2LT.pdf))

[E310] The September xx.xx 2025 SYLFAT 2LT document markets the offering as a component for lubricity improvers and assigns application suitability to the user.
([sds.kraton.com](https://sds.kraton.com/product-sds/shared-files/xx.xx/SYLFAT-2LT.pdf))

Wood chemistry - Segezha Group

[E311] Official TOFA offering establishes commercial-category participation only; Russian domestic volume remains an assumption.

Wood chemistry | Segezha Group

[E312] Segezha Group's official wood-chemistry portfolio offers tall oil fatty acids in named commercial grades.

[E314] The page provides commercial inquiry contacts and distinguishes TOFA from DTO, rosin, and pitch.

Wood Chemistry - Segezha Group

[E313] Segezha lists TOFA separately from other tall-oil products and supplies commercial inquiry information.
([segezha-group.com](https://segezha-group.com/en/product/wood-chemistry/))

A European Chemicals Industry Action Plan - COM(2025) 530 final, July 8, 2025

[E315] Demand and input-cost pressures constrain the direct-formulation price scenario; no TOFA-specific premium is observed.
([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

[E319] The broader chemical-demand assessment is counterevidence to unconstrained intermediate growth, not a numerical share benchmark.
([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

[E321] The official assessment of weak European chemical demand qualifies resin recovery and automatic price-pass-through assumptions.
([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

European Chemicals Industry Action Plan - COM(2025) 530

[E316] The Commission's July 2025 action plan identifies energy and feedstock cost pressures alongside weak European chemical demand. Applying those conditions to a particular TOFA customer's bargaining position remains conditional.
([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

[E317] The European Commission's July xx.xx 2025 chemicals action plan identifies energy and feedstock cost pressure alongside weak sector demand. These conditions are not TOFA-account-specific findings.
([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

[E318] The July 2025 Commission action plan identifies high energy costs, weak demand and geopolitical pressures affecting European chemicals. Applying these conditions to a particular TOFA account remains conditional.
([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

[E320] The documented European sector pressures support a conditional customer-budget and cost-recovery scenario, not a prediction for every TOFA application. ([single-market-economy.ec.europa.eu](https://single-market-economy.ec.europa.eu/document/download/e5006955-dd1c-45bc-8b7a-cfda71c67abf_en?filename=COM_2025_530_1_EN_ACT_part1_v6.pdf))

Liquid Biofuels | St1

[E322] St1 describes its Gothenburg biorefinery as designed for CTO fractions including fatty acids. The disclosure does not distinguish qualifying TOFA from lower-purity fatty-acid fractions or quantify actual TOFA purchases. ([st1.com](https://st1.com/about-us/sustainability/energy-transition/liquid-biofuels))

[E323] St1 describes its biorefinery as designed for CTO fractions such as fatty acids. The disclosure does not establish the minimum free-fatty-acid content of those inputs or observed merchant purchases of qualifying TOFA. It therefore leaves the narrow-boundary fuel application partial. ([st1.com](https://st1.com/about-us/sustainability/energy-transition/liquid-biofuels))

[E324] The disclosure establishes a fuel-producing business setting for fatty-acid feedstocks, not proof that a fuel establishment bought qualifying TOFA in 2025. ([st1.com](https://st1.com/about-us/sustainability/energy-transition/liquid-biofuels))

[E325] The disclosure establishes a fuel-producing business setting for fatty-acid feedstocks, rather than a chemical-distribution role. Narrow-boundary TOFA purchasing remains unresolved. ([st1.com](https://st1.com/about-us/sustainability/energy-transition/liquid-biofuels))

Surfachem | Surfachem at in-cosmetics Global 2026

[E326] Surfachem's March xx.xx 2026 business announcement identifies it as part of the 2M Group and describes its continuing European distribution operations.

[E327] The announcement supports current activity and the disclosed group relationship, not TOFA-specific sales in every European market.

Surfachem | International Services and Logistics Expertise

[E328] Surfachem advertises in-house logistics, repackaging, load consolidation, European teams and an agent and distributor network. These are company-level service descriptions, not commitments for a particular TOFA grade and destination. ([surfachem.com](https://surfachem.com/international/about/international-services-and-logistics))

Surfachem | Surfachem

[E329] SURFAC brand entries support commercial participation but do not establish independently controlled production origins. ([surfachem.com](https://surfachem.com/international/manufacturer/surfachem))

[E330] Surfachem's portfolio lists SURFAC TOFA xx.xx SURFAC TOFA xx.xx and SURFAC TOFA xx.xx and identifies Surfachem Group Ltd in its corporate footer. The listing does not resolve the upstream manufacturer. ([surfachem.com](https://surfachem.com/international/manufacturer/surfachem))

[E331] Surfachem's portfolio lists SURFAC TOFA offerings without resolving the upstream manufacturer. ([surfachem.com](https://surfachem.com/international/manufacturer/surfachem))

Surfachem | Terms and Conditions - Sale

[E332] The published sales terms define the seller as Surfachem Ltd, require acceptance before an order becomes binding, and describe delivery dates as estimates. Their applicability must be established for the proposed transaction rather than assumed across all group entities. ([surfachem.com](https://surfachem.com/international/policies-and-tcs/terms-and-conditions-of-sale))

Surfachem | SURFAC® TOFA 2

[E333] Advertises SURFAC TOFA xx.xx in its commercial product portfolio.

[E334] Identifies Surfachem Group Ltd and its UK registration details.

[E335] States that products sold under its trademarks are manufactured by third-party suppliers.

Taaleri and HitecVision Complete EUR 75 Million First Tranche of Fintoil's Financing Round - August 28, 2026

[E336] A EUR xx.xx completed financing tranche and EUR xx.xx trailing-twelve-month revenue support investment capacity and commercial continuity, not contracted qualifying TOFA growth.

[E337] The August xx.xx 2026 release confirms financing completion and continuing multiproduct sales, providing a commercial counterweight to an assumed contraction; the resulting low-band forecast remains modeled.

Taaleri and HitecVision accelerate Fintoil’s growth to capture surging demand for advanced biofuels - July 7, 2026

[E338] EUR xx.xx 2025 revenue anchors assumed TOFA scope and domestic destination; broad growth ambitions do not establish TOFA demand growth.

[E339] Mixed-portfolio revenue supports a bounded Finnish commercial component, not automatic attribution of biofuel revenue to TOFA.

[E342] The portfolio-company revenue comparison and announced investment support a commercial expansion signal, but do not quantify qualifying TOFA fuel demand.
([taaleri.com](https://www.taaleri.com/press-release/taaleri-and-hitecvision-accelerate-fintoils-growth-to-capture-surging-demand-for-advanced-biofuels/))

Taaleri and HitecVision accelerate Fintoil’s growth to capture surging demand for advanced biofuels - Taaleri

[E340] Taaleri's business announcement identifies Fintoil Hamina Oy and its chief executive as the operating-company contact.

[E341] The announcement describes an operating Hamina biorefinery and commercial sales to existing and new markets; its total-business figures are not treated as TOFA-specific revenue.

Taaleri Annual Report 2025 - Fintoil Case and Key Figures

[E343] The Fintoil case reports EUR xx.xx revenue and xx.xx% aggregate utilization for 2025. These constrain the modeled entrant adjustment and utilization bridge, not the low-band share directly.

[E344] The same multiproduct financial and commercial anchors support a scale check on the assumed qualifying higher-band subset; TOFA-only tonnage and revenue remain modeled.

UN Intermediate Bulk Containers (IBCs)

[E345] Drums are expressly distinguished from IBCs in the official containment definition, supporting separate classification by package design.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E346] Drums are expressly outside the cited IBC definition, supporting their separate package-design category.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E348] IBCs are identified as portable containment designed for mechanical handling and expressly distinguished from drums and jerricans.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E350] Jerricans are expressly distinguished from IBCs in the official containment definition; this establishes terminology, not TOFA-specific market materiality.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E351] Jerricans are expressly outside the IBC definition. This establishes terminology, not qualification or materiality of a TOFA offering.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E352] The official containment definition separates mechanically handled IBCs from drums and jerricans. It supports design-based distinctions, not TOFA-specific demand or automatic dangerous-goods classification.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E354] The official definition treats an IBC as a portable containment type designed for mechanical handling and expressly excludes drums and jerricans.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

[E356] Transport Canada's UN-container definition distinguishes mechanically handled IBCs from drums and jerricans, providing a recognized containment-design distinction. This terminology does not establish that every TOFA grade is regulated as dangerous goods.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

UN Intermediate Bulk Containers (IBCs) - Transport Canada

[E347] Drums are outside the cited IBC definition, supporting separate commercial classification without establishing TOFA demand.

[E349] Jerricans are distinguished from IBCs. The definition does not establish TOFA product eligibility, sales or transport classification.

[E353] The official definition distinguishes mechanically handled IBCs from drums and jerricans, supporting non-overlapping containment classification rather than a volume weight.

[E355] Transport Canada defines IBCs as containment designed for mechanical handling and distinguishes them from drums and jerricans. This terminology does not classify a TOFA grade as dangerous goods.
([tc.canada.ca](https://tc.canada.ca/en/dangerous-goods/containers/intermediate-bulk-containers-ibcs))

Tall Oil Fatty Acid - Catalynt

[E357] Catalynt's TOFA entry lists bulk and totes with a commercial inquiry route. ([teamcatalynt.com](https://teamcatalynt.com/product/tall-oil-fatty-acid/))

[E358] Catalynt's official catalog offers Tall Oil Fatty Acid and a quotation route.

[E359] The page identifies the company's headquarters in Edmonds, Washington.

Why Catalynt - Catalynt

[E360] Catalynt's company history states that TRI rebranded as Catalynt Solutions, Inc. in 2024.

[E361] The page does not establish TOFA-specific sales, production ownership, or comparative scale.

[E362] The page identifies a women-owned supplier business and its Edmonds headquarters, supporting treatment of TRInternational as a former name rather than another participant.

Catalynt Industry - Lubricants Metal Working & Metal Care

[E363] The company-issued line card identifies Catalynt Solutions, Inc., formerly TRInternational, Inc., at an Edmonds, Washington address.

[E364] The line card lists Tall Oil Fatty Acid among its offered products and describes the business as women-owned.

Tall Oil Fatty Acid (TOFA) Supplier - The Chemical Company

[E365] Identifies its Jamestown, Rhode Island business address and advertises commercial shipping formats.

[E366] Offers Tall Oil Fatty Acid through a product-specific quotation page.

[E367] The Chemical Company maintains a TOFA-specific supplier page and inquiry route; the listing is not a binding delivery commitment. ([thechemco.com](https://thechemco.com/chemical/tall-oil-fatty-acid-tofa/))

FAQ: How a TOFA Supplier Supports the Resin Industry

[E368] Provides a direct inquiry route for TOFA distribution.

[E369] States that The Chemical Company sources TOFA for North American resin manufacturers, coatings formulators, and industrial buyers.

UCY Tall Oil Solutions | Contact

[E370] The contact page identifies UCY business services & trading GmbH and a Leverkusen, Germany business address.

[E371] The page links the tall-oil business to UCY Energy's commercial contact.

UCY Tall Oil Solutions | Products

[E372] The TOFA listing describes a European and global commercial focus.

[E373] UCY's commercial portfolio separately lists tall oil fatty acids, distilled tall oil, crude tall oil, rosin, and pitch.

Products - UCY Tall Oil Solutions

[E374] UCY's portfolio distinguishes TOFA from CTO, DTO, rosin and pitch, supporting a product-specific trading inquiry. ([ucy-talloel.de](https://ucy-talloel.de/en/products.html))

UNSD - ISIC Rev. 4, Class 1920: Manufacture of Refined Petroleum Products

[E375] ISIC Rev. xx.xx class 1920 includes motor fuels, oil-based lubricants and greases, and biofuel blending. It supports the refinery and lubricant-manufacturing portion of the working buyer group; renewable-fuel producers are an explicit analytical extension by principal output. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/1920))

UNSD - ISIC Rev. 4, Class 2011: Manufacture of Basic Chemicals

[E376] Basic-chemical classification supports separating oleochemical intermediate purchasing from primary resin and prepared-product purchasing; it is not a sales weight.

[E377] ISIC Rev. xx.xx class 2011 includes basic organic chemicals such as carboxylic acids, esters and nitrogen-function compounds, while excluding primary plastics and synthetic rubber. This establishes an industry-definition anchor, not TOFA purchasing activity. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2011))

[E378] The class belongs to division xx.xx manufacture of chemicals and chemical products. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2011))

UNSD - ISIC Rev. 4, Class 2013: Manufacture of Plastics and Synthetic Rubber in Primary Forms

[E379] ISIC Rev. xx.xx class 2013 covers primary resins and synthetic rubber, explicitly including alkyd, polyester, polyamide and epoxide resins. This distinguishes primary-material manufacturers from downstream product converters. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2013))

[E380] ISIC Rev. xx.xx class 2013 identifies primary resins and synthetic rubber as a distinct manufacturing activity. Classification does not itself establish TOFA purchasing. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2013))

[E381] Primary resin and synthetic-rubber manufacture is distinct from downstream product conversion, supporting the conditional purchasing denominator.

UNSD - ISIC Rev. 4, Class 2021: Manufacture of Pesticides and Other Agrochemical Products

[E382] ISIC Rev. xx.xx class 2021 includes pesticide manufacture and disinfectants for agricultural and nonagricultural use; fertilizer manufacture is excluded. This supports the sector boundary, not current TOFA demand. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2021))

UNSD - ISIC Rev. 4, Class 2022: Manufacture of Paints, Varnishes and Similar Coatings, Printing Ink and Mastics

[E383] ISIC Rev. xx.xx class 2022 groups paint, varnish, coating, printing-ink, mastic and caulking manufacture, separately from basic chemical production. It establishes the buyer-sector definition, not direct raw-TOFA purchases. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2022))

UNSD - ISIC Rev. 4, Class 2023: Manufacture of Soap and Detergents, Cleaning and Polishing Preparations, Perfumes and Toilet Preparations

[E384] Class 2023 excludes separately chemically defined compounds to class 2011. This provides a borderline rule between basic-chemical establishments and surface-active-agent or soap establishments, not a split based solely on intended end use. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2023))

[E385] ISIC Rev. xx.xx class 2023 includes organic surface-active agents, soaps, cleaning preparations and personal-care products, supporting an activity-based grouping rather than classification by customer application. It does not establish TOFA purchasing. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2023))

[E386] ISIC Rev. xx.xx class 2023 includes organic surface-active agents, soaps, detergents and personal-care preparations. This supports activity-based buyer classification rather than classification solely by application. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2023))

[E387] ISIC Rev. xx.xx class 2023 includes organic surface-active agents, soaps, detergents, cleaning and polishing products, and personal-care preparations. Separately defined chemical compounds are excluded to basic chemicals. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2023))

[E388] The class includes organic surface-active agents, soaps and cleaning preparations, supporting activity-based buyer attribution rather than final-use attribution.

UNSD - ISIC Rev. 4, Class 2029: Manufacture of Other Chemical Products

[E389] Class 2029 excludes asphalt-based adhesive manufacture to class xx.xx. The working buyer partition therefore assigns principally asphalt-based adhesive establishments to construction materials, while application may still be adhesives. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2029))

[E392] ISIC Rev. xx.xx class 2029 explicitly includes prepared adhesives, textile and leather finishing materials, cement additives, lubricating-oil additives and prepared rubber accelerators. Its basic-chemical, coating and personal-care exclusions support a distinct specialist-formulator grouping. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2029))

[E394] ISIC Rev. xx.xx class 2029 includes prepared adhesives, textile/leather finishing materials, cement additives and lubricating-oil additives, while excluding basic bulk compounds, printing inks and personal-care preparations. These are industry-definition anchors, not evidence of direct TOFA purchases. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2029))

UNSD - ISIC Rev. 4, Class 2029: Manufacture of Other Chemical Products n.e.c.

[E390] Construction-additive manufacture does not automatically identify a construction contractor as the raw-material buyer.

[E391] Finishing-chemical manufacturers remain separate from paper, textile and leather operators when assigning raw TOFA purchases.

[E393] ISIC Rev. xx.xx class 2029 includes prepared adhesives, textile and leather finishing materials, cement additives and industrial additives. An industrial destination therefore does not establish a nonchemical purchasing establishment. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/2029))

[E395] Prepared adhesives and specialty industrial additives belong to chemical manufacture; classification supports numerator separation but not its monetary size.

UNSD - ISIC Rev. 4, Section B: Mining and Quarrying

[E396] ISIC separates petroleum and natural-gas extraction from solid-mineral mining and recognizes specialized mining support services. This supports a distinct oil-and-gas buyer setting without treating chemical suppliers as extraction establishments. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/B))

[E397] The mining section includes mineral preparation and concentration associated with extraction, while distinguishing downstream manufacturing. This anchors the mining and beneficiation buyer boundary, not direct TOFA procurement. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/B))

UNSD - ISIC Rev. 4, Section C: Manufacturing

[E398] Division xx.xx separately identifies manufacture of rubber and plastics products. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/C))

[E399] Division xx.xx identifies nonmetallic mineral-product manufacturing, distinguishing material production from chemical manufacture and construction services. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/C))

[E400] Divisions xx.xx xx.xx and xx.xx separately identify textile, leather and paper manufacturing activities, providing boundaries for the combined working buyer group. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/C))

[E401] Divisions xx.xx and xx.xx identify basic-metal and fabricated-metal manufacture. Their existence does not establish direct TOFA purchasing. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/C))

[E402] ISIC distinguishes manufacturing establishments producing intermediate materials from those producing finished products. These activity definitions support buyer-industry classification independently of product application. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/C))

UNSD - ISIC Rev. 4, Section E: Water Supply, Sewerage, Waste Management and Remediation Activities

[E403] ISIC separately identifies water collection, treatment and supply, and sewerage. These define operating-service buyers rather than treatment-chemical manufacturers; direct TOFA purchasing is not established. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/E))

UNSD - ISIC Rev. 4, Section F: Construction

[E404] ISIC Section F covers building construction, civil engineering and specialized construction, including work undertaken on contract. It distinguishes contractor activity from manufacturing; it does not establish contractor purchases of neat TOFA. ([unstats.un.org](https://unstats.un.org/unsd/classifications/Econ/Detail/EN/xx.xx/F))

WITS / UN Comtrade: H0 151913 gross imports by reporting country, 2024

[E405] Destination-import inputs.

[E406] Imports.

WITS / UN Comtrade: H0 151913 gross exports by reporting country, 2023

[E407] UAE gross exports provide an independent quantitative challenge to equating hub imports with local consumption.

WITS / UN Comtrade: H0 151913 gross imports by reporting country, 2023

[E408] Older destination-import observation used with an explicit temporal bridge.

[E409] Older import observation anchors the UAE routing model.

WITS / UN Comtrade: H0 151913 gross exports by reporting country, 2024

[E410] Gross outward flows support a routing adjustment, not direct net consumption.

[E411] Outward flows inform the retained-import assumption.

[E412] Swedish export value anchors an assumed domestic/export sales relationship.

[E413] US TOFA exports constrain the domestic merchant-sales bridge; exports are not domestic demand.

WITS / UN Comtrade: H0 151912 gross imports by reporting country, 2024

[E414] Oleic-acid imports are an adjacent purchasing proxy, not observed TOFA sales.

Nosotros | Industria y Derivados

[E415] Adeps Lanae's official company page describes its Argentine business history and identifies its Berisso, Buenos Aires location.

[E416] The page establishes the observed business identity and location, not TOFA participation.

Productos Químicos - Adeps Lanae

[E417] Adeps Lanae's inspected general-chemicals catalog does not substantiate the proposed TOFA-specific purchasing alternative. ([adeps.com.ar](https://www.adeps.com.ar/timper.html))

[E418] TOFA is not listed on this inspected catalog page; the page therefore does not substantiate a current TOFA offering.

[E419] The inspected Adeps Lanae general-chemicals catalog advertises inorganic chemicals and identifies its Berisso business address.

News | Aik Moh Singapore

[E420] Aik Moh's official news page reports completion of its acquisition by Brenntag in July 2023.

[E421] The announcement identifies the group's business footprint in Singapore, Malaysia, Indonesia, and the Philippines.

[E422] The ownership record does not establish TOFA sales in every named country.

Industrial Product List - PT Aik Moh Chemicals Indonesia

[E423] Aik Moh's historical Indonesian industrial product list includes TOFA but does not establish a current selling subsidiary or principal.
([aikmoh.com.sg](https://www.aikmoh.com.sg/pdf/PT-Aik-Moh-Chemicals-Indonesia-Product-List.pdf))

PRODUCT LIST (industrial chemicals) - AIK MOH Chemicals Indonesia

[E424] The document bears a 2014 copyright and supports historical Indonesian channel participation, not confirmed present availability.

[E425] The document describes Aik Moh as reselling chemical manufacturers' products.

[E426] The official PT Aik Moh Chemicals Indonesia product list includes Tall Oil Fatty Acid.

TALLOIL - Allchital Supplier Document

[E427] Allchital's January xx.xx 2026 document identifies TALLOIL; document existence does not establish an accepted commercial order. ([allchital.it](https://www.allchital.it/wp-content/uploads/2026/xx.xx/0900800_-_TALLOIL_IT.pdf))

Scheda di dati di sicurezza - TALLOIL

[E428] Document existence does not independently establish current market availability or the exact contracting legal entity.

[E429] The Allchital-hosted supplier document dated January xx.xx 2026 identifies TALLOIL, article xx.xx with CAS xx.xx-xx.xx-xx.xx.

TALL OIL FATTY ACID (TOFA) | Ataman Kimya A.Ş.

[E430] Ataman Kimya A.Ş. maintains an official commercial product page for Tall Oil Fatty Acid (TOFA).

[E432] The page identifies Ataman Kimya A.Ş. and an Istanbul, Türkiye business address.

Tall Oil Fatty Acid (TOFA) - Ataman Kimya

[E431] Ataman maintains a TOFA-specific commercial product page, supporting an offering inquiry rather than inferred production ownership.
([ataman-chemicals.com](https://www.ataman-chemicals.com/en/products/tall-oil-fatty-acid-tofa-xx.xx.html))

Azelis Announces New Partnership with DRT in Europe

[E433] Azelis's April xx.xx 2019 announcement identifies DRT TOFA distribution in Europe excluding Spain and Portugal. ([azelis.com](https://www.azelis.com/en/news/azelis-announces-new-partnership-drt-europe))

[E434] Azelis's April xx.xx 2019, announcement identifies its DRT TOFA agreement for Europe excluding Spain and Portugal, effective October xx.xx 2019. The stated territory cannot be generalized into worldwide rights or assumed continuing authority. ([azelis.com](https://www.azelis.com/en/news/azelis-announces-new-partnership-drt-europe))

Azelis announces new partnership with DRT in Europe

[E435] Azelis's dated agreement identifies DRT as the principal supplying TOFA and DTO to its European distribution channel.

[E436] On April xx.xx 2019, Azelis announced a direct distribution agreement for DRT TOFA and DTO across Europe excluding Spain and Portugal.

Oleochemicals - BIECO

[E437] BIECO's official oleochemical category provides a Tunis, Tunisia business address.

[E438] The inspected category displays no available products, so it does not substantiate the retained TOFA supplier lead.

Business Opportunities with NATO - Bureau of Industry and Security

[E439] BIS describes NSPA purchasing supplies and road-repair materials and offering opportunities through its supplier Source File. The guidance does not identify a direct TOFA purchase.
([bis.gov](https://www.bis.gov/about-bis/bis-leadership-and-offices/SIES/business-opportunities-nato))

Unique Fine Product - Commercial Portfolio

[E440] Unique Fine Product lists TOFA within lubricant, metalworking and resin-industry portfolios.
([brighten-unique.com](https://www.brighten-unique.com/unique-fine-product-xx.xx.page))

Screening Assessment - Fatty Acids and Derivatives Group, August 2020

[E441] 2011 Canadian imports were xx.xx kg; historical lubricant uses do not establish current global fuel-buyer shares.

[E442] Building and construction materials are reported TOFA destinations, not identified purchasing establishments.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E443] Building and construction materials are reported TOFA destinations.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E444] Historical Canadian reporting identifies TOFA in coatings and adhesives/sealants, without separating direct inputs from derived ingredients.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E445] Historical reporting identifies TOFA coating and adhesive/sealant uses but no application value split.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E446] Paper products and food packaging are reported TOFA destinations; direct mill procurement is not identified.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E447] Paper products and food packaging are reported TOFA destinations; direct mill purchasing is not identified.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E448] Pest-control and disinfectant use records support classification, not numerical purchasing weights.

[E449] Reported cleaning and personal-care uses support the category boundary, not current global quantities.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E450] Reported construction uses support category presence, not contractor purchasing weights.

[E451] Reported extraction uses support a commercial setting, not an operator-purchasing percentage.

[E452] Reported metal-material uses do not distinguish raw purchasers from prepared-product users.

[E453] Reported paper uses support the modeled category's historical commercial premise.

[E454] Reported water-treatment use supports a commercial premise but leaves operator procurement unresolved.

[E455] TOFA is identified as a formulant in registered pest-control products; this is not current sales evidence.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E456] TOFA is reported for oil and natural gas extraction applications.
([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E457] TOFA is specifically reported for oil and natural-gas extraction uses. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E458] TOFA is specifically reported in personal-care, cleaning and furnishing-care destinations. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E459] TOFA uses are reported in lubricants and greases. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E460] TOFA uses are reported in personal care, cleaning and furnishing care, and automotive care. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E461] Table xx.xx-xx.xx records TOFA uses in paints and coatings, and adhesives and sealants. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E462] Table xx.xx-xx.xx identifies TOFA as a formulant in registered pest-control products. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E463] The August 2020 assessment records TOFA uses in personal care, paper products and water treatment, and identifies it as a formulant in registered pest-control products. These are dated Canadian records. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E464] The assessment distinguishes TOFA from potassium tallate and dimer/trimer acids; use attribution must preserve those separate identities. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E465] The assessment identifies downstream use settings without naming their TOFA purchasing establishments; it does not settle account-level purchasing mandates. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E466] The assessment supplies historical Canadian TOFA quantities and paper-use attribution, used only as limited regional scale context. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E467] The formulant record supports a dated commercial-use classification rather than current sales or blanket authorization. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E468] The historical survey did not report TOFA under fuels and related products. That limited record cannot establish absence of current Global fuel demand. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E469] The statutory-survey use table reports TOFA separately from potassium tallate and dimer/trimer acids. These Canadian use records do not establish current worldwide allocations. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E470] Water treatment is a reported TOFA destination; the record does not disclose its purchasing volume. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E471] Water treatment is a reported TOFA use, without identification of the purchasing establishment. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

[E472] Water treatment is reported for TOFA, without identifying utility or formulator purchases. ([canada.ca](https://www.canada.ca/en/environment-climate-change/services/evaluating-existing-substances/screening-assessment-fatty-acids-derivatives-group.html))

Delivery Program / Portfolio - Carroux Handelsgesellschaft mbH

[E473] The company's delivery portfolio expressly offers distilled tall oil fatty acid separately from distilled tall oil.

[E474] The page identifies Carroux Handelsgesellschaft mbH and a business address in Marschacht, Germany.

Frequently Asked Questions - Wholesale, 2022 Economic Census

[E475] Manufacturers' sales branches and offices are owned by or corporately affiliated with manufacturers and sell the parent's products, supporting their inclusion in producer-controlled selling. ([census.gov](https://www.census.gov/programs-surveys/economic-census/year/2022/about/faq/faq-wholesale.html))

[E476] Merchant wholesalers purchase merchandise on their own account; importers and exporters can fall within this commercial role. ([census.gov](https://www.census.gov/programs-surveys/economic-census/year/2022/about/faq/faq-wholesale.html))

[E477] The 2022 Economic Census defines manufacturers' sales branches and offices as owned by or corporately affiliated with manufacturers and selling the parent's products. Grouping controlled affiliates with producer-controlled Direct Sales is an explicit analytical adaptation rather than treatment of every wholesale establishment as independent resale. ([census.gov](https://www.census.gov/programs-surveys/economic-census/year/2022/about/faq/faq-wholesale.html))

[E478] The official commercial classification distinguishes merchant wholesalers, manufacturer-affiliated sales establishments, and agents acting for others. Applying those ownership and agency distinctions to TOFA is an analytical adaptation, not a claim about global channel shares. ([census.gov](https://www.census.gov/programs-surveys/economic-census/year/2022/about/faq/faq-wholesale.html))

Monthly Wholesale Trade - Definitions

[E479] A distributor buys and owns products before resale. The drop-shipment definition confirms that a wholesaler can make the sale even when the manufacturer delivers directly to the customer. ([census.gov](https://www.census.gov/wholesale/definitions.html))

[E480] A distributor owns products before resale; a wholesaler may make the sale even when the manufacturer ships directly to the customer. Physical delivery therefore does not determine seller-channel classification. ([census.gov](https://www.census.gov/wholesale/definitions.html))

[E481] Agents and brokers represent others in negotiating transactions, generally earn a commission or fee, and do not take title to the goods. ([census.gov](https://www.census.gov/wholesale/definitions.html))

[E482] Agents and brokers represent others, generally receive a commission or fee and do not take title. This supports separating commercial agency from independent resale. ([census.gov](https://www.census.gov/wholesale/definitions.html))

[E485] The Census definitions distinguish distributors that take title from agents and brokers representing others. They separately identify e-commerce and drop shipping, supporting treatment of those as ordering or fulfillment features rather than additional title-based channels. ([census.gov](https://www.census.gov/wholesale/definitions.html))

[E486] The definitions distinguish title-taking distribution from representation without title and treat e-commerce and drop shipment separately. Applying title-taking precedence to multistep TOFA routes is an analytical allocation rule, not an official TOFA sales statistic. ([census.gov](https://www.census.gov/wholesale/definitions.html))

Monthly Wholesale Trade - Definitions, U.S. Census Bureau

[E483] Census definitions distinguish title-taking distributors from agents and brokers representing others. Drop shipment permits producer delivery when a wholesaler makes the sale. ([census.gov](https://www.census.gov/wholesale/definitions.html))

Contact Cestoil | Locations & Sales Contacts

[E487] Cestoil identifies its headquarters in Richmond Hill, Ontario, and its primary business contact at the Courtice plant.

[E488] These locations establish a Canadian business presence but do not attribute TOFA production to a particular plant.

Tall Oil Fatty Acids - EcoTall Grades - Cestoil

[E489] Cestoil advertises EcoTall L1, L1A, L1S, L3 and L5 as differentiated TOFA offerings. ([cestoil.com](https://www.cestoil.com/products-applications/renewable-ingredients/tall-oil-fatty-acids/))

[E491] The portfolio is marked with a September 2026 product-data update; that is not evidence of a new production asset or buyer adoption. ([cestoil.com](https://www.cestoil.com/products-applications/renewable-ingredients/tall-oil-fatty-acids/))

Tall Oil Fatty Acids | EcoTall Grades | Cestoil

[E490] Cestoil's official portfolio advertises EcoTall L1, L1A, L1S, L3, and L5 as tall oil fatty acid offerings.

[E492] The portfolio page is marked with a September 2026 product-data update.

Quality Assurance | Cestoil

[E493] Cestoil's quality page identifies Cestoil Chemical Inc. and a company-reported quality-management certificate effective May xx.xx 2026.

[E494] The stated certification scope is supply of specialty chemicals and technical support, supporting an active supplier identity rather than establishing TOFA manufacture.

General Industrial Chemical List | Challenger Avenue (M) Sdn Bhd

[E495] Challenger Avenue (M) Sdn Bhd's official industrial-chemical catalog lists Tall Oil Fatty Acid.

[E497] The page identifies a Subang Jaya, Selangor, Malaysia business address and a commercial inquiry route.

General Industrial Chemical List - Challenger Avenue

[E496] Challenger Avenue's general industrial catalog lists TOFA; the listing does not establish a current named principal or binding fulfillment. ([challenger.com.my](https://www.challenger.com.my/showproducts/productid/xx.xx/cid/xx.xx/general-industrial-chemical-list/))

Tall Oil Fatty Acid TOFA 2 - Chemical Supplies UK

[E498] Chemical Supplies UK's TOFA xx.xx storefront establishes a catalog association, not an accepted destination-level delivery commitment. ([chemicalsuppliesuk.co.uk](https://www.chemicalsuppliesuk.co.uk/product-page/tall-oil-fatty-acid-tofa-xx.xx))

Tall Oil Fatty Acid TOFA 2 | Chemical Supplies UK

[E499] The Chemical Supplies UK storefront has a product listing titled Tall Oil Fatty Acid TOFA xx.xx.

[E500] The inspected listing is marked Out of Stock, so it does not establish immediate availability.

ChemPoint Introduces Ask ChemPoint: AI-Powered Product Answers - June 1, 2026

[E501] ChemPoint announced the launch of Ask ChemPoint on June xx.xx 2026 as an available natural-language information service. It provides a chemical-distribution interface example, not proof of TOFA-specific deployment. ([chempoint.com](https://www.chempoint.com/en-mx/news/2026/chempoint-introduces-ask-chempoint-ai-powered-prod))

CountMe Chemicals - Chemical Marketplace

[E502] CountMe presents itself as a chemical marketplace; that presentation does not identify the merchant accepting a proposed TOFA order. ([countmechemicals.com](https://www.countmechemicals.com/category/oleochemicals))

Tall Oil Fatty Acids Supplier and Distributor

[E503] A dedicated official page identifies Tall Oil Fatty Acids supplier and distributor participation, improving the earlier navigation-only product link. ([covalentchemical.com](https://www.covalentchemical.com/bulk-LTL-distributor/tall-oil-fatty-acids-xx.xx-xx.xx.aspx))

[E505] The page footer identifies Covalent Chemical LLC; a current registry record and ownership chain were not established.

Tall Oil Fatty Acids Supplier and Distributor - Covalent Chemical

[E504] Covalent Chemical's dedicated page advertises tall-oil fatty-acid supplier and distributor participation. ([covalentchemical.com](https://www.covalentchemical.com/bulk-LTL-distributor/tall-oil-fatty-acids-xx.xx-xx.xx.aspx))

Fatty Acids Supplier and Distributor - Bulk & LTL

[E506] Maintains a product-category page advertising a fatty-acid supplier and distributor role.

[E507] This broader portfolio record does not independently resolve its specific TOFA offering.

Product List - Disa Chem Trading

[E508] Disa Chem Trading's official product list advertises Tall Oil Fatty Acid under product code xx.xx-xx.xx.

Daping Oils & Fats Chairman, General Manager, And Sales Director Visit Clients in South Korea

[E509] A June xx.xx 2026 company announcement reports a May xx.xx-xx.xx 2026 visit to existing customers in Seoul, South Korea.

[E510] The announcement identifies TOFA among products involved in those customer relationships; buyers and attributed TOFA sales are not disclosed.

Tall Oil Fatty Acid - Dalian Daping Oil Chemicals

[E511] Dalian Daping's official catalog advertises tall-oil fatty acid, without independently establishing each offer's origin or production ownership. ([dldpfattyacid.com](https://www.dldpfattyacid.com/tall-oil-fatty-acid/))

China Tall Oil Fatty Acid Manufacturers - Tall Oil Fatty Acid Price - Daping Chemicals

[E512] The catalog supports a supplier offering, not independently verified tall-oil feedstock origin or production ownership.

[E513] The official catalog advertises Tall Oil Fatty Acid and provides a commercial inquiry route.

[E514] The page identifies Dalian Daping Oil Chemicals Co.,Ltd and a Dalian, China business address.

DRT announces new partnership with Quimidroga in Europe - DRT

[E515] DRT announced Quimidroga's distribution of Resinoline BD xx.xx TOFA in Northern Africa, Spain and Portugal, effective October xx.xx 2019.

[E516] DRT's May xx.xx 2019 announcement names Quimidroga as distributor of Resinoline BD xx.xx TOFA in Spain and Portugal.

[E518] The May xx.xx 2019 announcement identifies DRT as the TOFA principal in the Quimidroga agreement.

[E519] The dated announcement establishes a historical supplier relationship, not uninterrupted current distribution.

DRT Announces New Partnership with Quimidroga in Europe

[E517] DRT's May xx.xx 2019, announcement names Resinoline BD xx.xx as TOFA and Quimidroga as its distributor for Spain, Portugal and Northern Africa, effective October xx.xx 2019. It is dated mandate evidence, not proof of uninterrupted authority. ([drt.fr](https://www.drt.fr/en/drt-announces-new-partnership-with-quimidroga-in-europe/))

Firmenich Successfully Completes Acquisition of DRT - DRT

[E520] The May xx.xx 2020 company announcement confirms completion of Firmenich International SA's acquisition of DRT, distinguishing a completed transaction from the earlier exclusivity announcement. ([drt.fr](https://www.drt.fr/en/firmenich-successfully-completes-acquisition-of-drt/))

Legal notice - DRT

[E521] DRT's legal notice identifies the website operator as Les Dérives Résiniques Et Terpéniques, a French simplified joint-stock company.

[E522] The notice does not establish the current ownership chain or explain legal succession from earlier DRT entities.

[E523] The notice supplies RCS Dax registration number xx.xx xx.xx xx.xx and a Dax headquarters address, strengthening the connection between the DRT name and a legal operating identity.

Plant resins for coatings and construction by DRT

[E524] DRT's accessible official coatings and construction portfolio lists Resinoline BD xx.xx under fatty acids.

[E525] The portfolio describes this product as fatty acids obtained from tall oil.

Ingrédients d'origine végétale pour revêtement & construction - DRT

[E526] DRT's French coatings and construction portfolio lists Resinoline BD xx.xx under fatty acids and describes it as tall-oil-derived with low rosin content. The catalog establishes a marketed offering, not destination-specific availability. ([drt.fr](https://www.drt.fr/fr/marches/industrie/revetements-construction/))

DRT Industry Ingredients

[E527] The current official business page states that DRT has been integrated into the dsm-firmenich Group. The page supports the group relationship but does not explain succession between individual French legal entities. ([dsm-firmenich.com](https://www.dsm-firmenich.com/en/businesses/perfumery-beauty/ingredients/drt-industry-ingredients.html))

DRT Industry Ingredients - dsm-firmenich

[E528] The official business page states that DRT is integrated into the dsm-firmenich Group. It establishes group affiliation, not the legal seller or continued validity of an individual TOFA mandate. ([dsm-firmenich.com](https://www.dsm-firmenich.com/en/businesses/perfumery-beauty/ingredients/drt-industry-ingredients.html))

Barka Oman chemicals supplier | DUBI CHEM

[E529] DUBI CHEM identifies omanchem.com as its Oman chemical channel and describes Oman Chemicals using group-company and sister-concern language. This supports a company-stated affiliation, not a verified legal ownership chain or independent economic attribution. ([dubichem.com](https://www.dubichem.com/location/barka-oman-chemicals-supplier))

Paint and Construction Chemicals - Elite Chemicals

[E530] Elite Chemicals lists TOFA in its paint and construction chemicals portfolio. ([elitechemicals.com.tr](https://www.elitechemicals.com.tr/en/products/paint-and-construction-chemicals-xx.xx/))

Paint and Construction Chemicals | Elite Chemicals Kimya San. ve Tic A.Ş.

[E531] Elite Chemicals' official paint and construction chemicals portfolio lists Tall Oil Fatty Acid (TOFA).

[E532] The page identifies a Pendik, Istanbul business address.

ASEAN Free Trade Area (AFTA) - Enterprise Singapore

[E533] Enterprise Singapore describes ATIGA preferences, origin criteria and ASEAN cumulation; application to a proposed TOFA route remains conditional on its actual qualification. ([enterprisesg.gov.sg](https://www.enterprisesg.gov.sg/grow-your-business/go-global/international-agreements/free-trade-agreements/find-an-fta/afta))

TSCA Requirements for Importing Chemicals - US EPA

[E534] EPA assigns applicable chemical import certification to the importer or authorized agent and distinguishes compliance certification from non-subjection; this is not a TOFA product approval. ([epa.gov](https://www.epa.gov/tsca-import-export-requirements/tsca-requirements-importing-chemicals))

[E535] EPA assigns applicable chemical import certification to the importer or its authorized agent. The guidance does not clear an individual TOFA offering. ([epa.gov](https://www.epa.gov/tsca-import-export-requirements/tsca-requirements-importing-chemicals))

[E536] EPA requires applicable chemical import certification by the importer or its authorized agent, distinguishing TSCA compliance from applicable non-subjection. This guidance is not a TOFA product approval. ([epa.gov](https://www.epa.gov/tsca-import-export-requirements/tsca-requirements-importing-chemicals))

Approvals and Group Standards for Substances - New Zealand EPA

[E537] New Zealand EPA describes hazardous-substance approvals and group standards, supporting a destination-specific access assessment rather than assumed Australian clearance. ([epa.govt.nz](https://www.epa.govt.nz/hazardous-substances/substance-approvals-and-group-standards/))

Aminas Grasas - Etilenoaminas de México

[E538] Etilenoaminas de México's fatty-chemical portfolio supplies context but does not settle a proposed named raw-TOFA offer or selling role. ([etilenoaminasdemexico.com](https://www.etilenoaminasdemexico.com/AminasGrasas.html))

Aminas Grasas

[E539] Etilenoaminas de México's official commercial portfolio includes a fatty-acids category expressly describing tall-oil and tallow fatty acids.

[E540] This supports an advertised TOFA-related supplier offering, without establishing named grades or manufacturing ownership.

Eurostar Group - Chemicals Portfolio

[E541] Eurostar's chemical portfolio explicitly lists tall-oil fatty acid; this does not settle producer identity or a destination-level order. ([eurostar.co.za](https://www.eurostar.co.za/))

EUROSTAR GROUP - Global Trade. Trusted Supply.

[E542] The official portfolio lists Tall Oil Fatty Acid within oleochemicals and identifies Eurostar Chemicals as a group division.

[E543] The same page identifies Durban as the head office supporting Southern and Sub-Saharan Africa.

List of Substances - Fatty Acid Consortium

[E544] The consortium's substance list describes fatty acids, tall oil as regarded as exempted. This is an industry classification, not a regulator's supplier-specific clearance. ([fattyacidconsortium.com](https://www.fattyacidconsortium.com/uploads/FAC%20Substance%20List.pdf))

Forchem lists to bond market in Helsinki Stock Exchange - Forchem

[E545] Forchem explains that Forchem Oy merged into Respol Finland Oy in April 2016 and that the surviving company was renamed Forchem Oyj.

[E546] The announcement establishes the legal-name succession underlying the protected Forchem Oyj identity.

Forchem Receives ISCC Certification - March 17, 2021

[E547] Forchem's March xx.xx 2021 announcement reports ISCC EU and ISCC PLUS certification for relevant product lines. It does not establish current certificate scope or every subsequent transaction's transferred claim. ([forchem.com](https://www.forchem.com/articles/forchem-receives-iscc-certification/))

Forchem receives ISCC Certification

[E548] The March xx.xx 2021 company announcement reports both ISCC EU and ISCC PLUS certification for its bio-energy and fatty-acid product lines. This establishes commercial relevance of the named schemes, not certification of every shipment or current certificate validity. ([forchem.com](https://www.forchem.com/forchem-news/forchem-receives-iscc-certification/))

[E549] The announcement connects ISCC PLUS to the company's non-energy fatty-acid applications and specifically discusses its FOR2 tall-oil fatty acid offering. ([forchem.com](https://www.forchem.com/forchem-news/forchem-receives-iscc-certification/))

[E550] The announcement identifies an ISCC EU certified-product offering associated with renewable-energy customers. It does not establish transaction-level TOFA quantities or downstream eligibility in every jurisdiction. ([forchem.com](https://www.forchem.com/forchem-news/forchem-receives-iscc-certification/))

Ajankohtaista - Forchem

[E551] Forchem's official news page contains dated operating-company updates extending into 2026.

[E552] The page identifies the appointment of a new chief executive effective January xx.xx 2026, supporting continuing corporate activity.

Products - Forchem

[E553] Forchem describes Nordic crude tall oil and its Rauma business, supporting the geographic sourcing example. ([forchem.com](https://www.forchem.com/products/))

[E554] Forchem describes Nordic crude tall oil sourcing, supporting the geographic contrast and pulp-linked resource premise. ([forchem.com](https://www.forchem.com/products/))

[E555] Forchem describes a Nordic crude tall oil sourcing foundation, providing a company-specific contrast to Harima's disclosed U.S.-to-Japan chain. ([forchem.com](https://www.forchem.com/products/))

[E556] Forchem describes its Nordic sourcing foundation, providing a geographic counterexample to Harima's disclosed U.S.-to-Japan chain. ([forchem.com](https://www.forchem.com/products/))

[E557] Forchem distinguishes TOFA, DTO and TOR and identifies pulp-derived crude tall oil as its upstream resource. ([forchem.com](https://www.forchem.com/products/))

[E558] Forchem identifies Nordic crude tall oil as the foundation of its Rauma business; this is a company-specific sourcing example. ([forchem.com](https://www.forchem.com/products/))

[E559] Forchem identifies crude tall oil as a pulp-mill co-product, supporting analysis of TOFA's linked upstream resource. ([forchem.com](https://www.forchem.com/products/))

[E560] Forchem identifies crude tall oil as a pulp-mill co-product; the supply-dependency implication is analytical. ([forchem.com](https://www.forchem.com/products/))

[E561] Forchem presents TOFA, DTO and TOR as separate product categories and identifies pulp-derived crude tall oil as the foundation of its Rauma business. ([forchem.com](https://www.forchem.com/products/))

[E562] Forchem states a REACH registration exemption for its TOFA. This is the supplier's stated basis for its offering, not blanket regulatory clearance for every TOFA transaction. ([forchem.com](https://www.forchem.com/products/))

[E563] Forchem states that its TOFA is exempt from REACH registration and distinguishes the registered status of neighboring tall-oil products; this remains a supplier assertion within its stated scope. ([forchem.com](https://www.forchem.com/products/))

[E564] Forchem's official portfolio offers Tall Oil Fatty Acid separately from distilled tall oil, tall oil rosin, and pitch products.

[E565] The page identifies Forchem Oyj and its Rauma, Finland, contact address.

[E566] The portfolio spans multiple tall-oil products, supporting analysis of a broader supplier commercial position rather than TOFA alone. ([forchem.com](https://www.forchem.com/products/))

Tall Oil Fatty Acid (TOFA) - Forchem

[E567] FOR2 and FOR5 provide differentiated offering choices; FOR5's advertised applications include alkyd resins, metalworking fluids, oilfield chemicals, soaps and cleaners. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E568] FOR2 is offered for dimer acids, fatty-acid esters, soaps, ethoxylates and amines. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E569] FOR2, FOR2X and FOR5 support qualifying product-family attribution, not their numerical sales mix. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E570] Forchem advertises TOFA for alkyd resins and named oleochemical intermediates; these are supplier application descriptions, not customer purchase commitments. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E571] Forchem advertises differentiated FOR2, FOR2X and FOR5 TOFA offerings. The portfolio does not establish purchaser-approved interchangeability. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E572] Forchem describes FOR2 as low-rosin TOFA and FOR5 as TOFA with a distinctive fatty-acid and rosin-acid balance. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E573] Forchem differentiates FOR2 and FOR5 within TOFA and advertises both for alkyd-related purchasing settings. Category overlap does not establish interchangeability. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E574] Forchem differentiates FOR2, FOR2X and FOR5: FOR2 emphasizes low rosin content, FOR2X emphasizes low-temperature positioning, and FOR5 has a distinct fatty-acid and rosin-acid balance. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E575] Forchem distinguishes FOR2, low-temperature-positioned FOR2X and differently balanced FOR5 within its TOFA portfolio. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E576] Forchem identifies TOFA as a resin raw material, supporting classification and continuity assumptions rather than a sales weight. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E577] Forchem identifies biolubricants and metalworking fluids as TOFA destinations. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E578] Forchem identifies its TOFA offering for oilfield chemicals, supporting the commercial mapping but not its modeled size. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E579] Forchem markets FOR2 TOFA as a raw material for alkyd resins and identifies performance polymers among its TOFA destinations. This supports its own commercial offering, not a market-wide allocation. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E580] Forchem markets FOR2 as low-rosin TOFA, positions FOR2X for low-temperature requirements and identifies FOR5 as TOFA with a distinct fatty-acid and rosin-acid balance. Advertised differentiation does not establish buyer acceptance. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E581] Forchem markets FOR5 TOFA for oilfield chemicals. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E582] Forchem positions FOR2X separately for low-temperature requirements, demonstrating differentiation within its low-rosin offerings. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E583] Forchem's named TOFA grades establish differentiated commercial offerings, not buyer-approved interchangeability. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E584] Forchem's named TOFA offerings establish application-specific commercial propositions rather than evidence of new customer commitments. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E585] Fuel additives are an expressly advertised TOFA destination. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E586] Named intermediate destinations support distinguishing upstream oleochemical purchases from downstream formulations. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E587] The company's TOFA offerings include biolubricant and metalworking applications; quantities and forecast adoption remain modeled. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

[E588] The company's cleaner and soap applications support direct-formulation classification, not a quantified purchasing mix. ([forchem.com](https://www.forchem.com/products/tall-oil-fatty-acid-tofa/))

Sustainability - Forchem

[E589] Forchem describes crude tall oil and steam relationships with pulp mills; contractual continuity and comparative environmental advantage are not established by that description. ([forchem.com](https://www.forchem.com/sustainability/))

[E590] Forchem describes crude tall oil and steam sourcing relationships with pulp mills and the return of residual materials for energy use. These company disclosures do not establish a transaction-specific comparative carbon advantage. ([forchem.com](https://www.forchem.com/sustainability/))

Forchem OYJ ISCC EU Certificate - September 28, 2025-September 27, 2026

[E591] Forchem's published ISCC EU certificate specifies validity from September xx.xx 2025, to September xx.xx 2026. This document alone cannot establish coverage for deliveries outside that period. ([forchem.com](https://www.forchem.com/wp-content/uploads/2025/xx.xx/2025-2026-ISCC-EU.pdf))

Forchem OYJ ISCC PLUS Certificate - September 28, 2025-September 27, 2026

[E592] Forchem's published ISCC PLUS certificate specifies validity from September xx.xx 2025, to September xx.xx 2026. A later delivery and named transaction claim require their own applicable coverage confirmation. ([forchem.com](https://www.forchem.com/wp-content/uploads/2025/xx.xx/2025-2026-ISCC-PLUS.pdf))

FOR2 Product Datasheet - PDS FOR2 007, April 2026

[E593] FOR2's typical free-fatty-acid content is xx.xx%, with typical free rosin of xx.xx%. This corroborates an advertised lower-band example only; it does not establish actual lot composition or 2025 sales. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR2-datasheet-xx.xx.pdf))

[E594] FOR2's typical values are xx.xx% free rosin acids and xx.xx% free fatty acids, illustrating material within the lower band. Its xx.xx% maximum specification does not guarantee that all conforming shipments remain below xx.xx%. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR2-datasheet-xx.xx.pdf))

[E595] The April 2026 FOR2 datasheet describes low-rosin positioning and separately presents specifications and typical characteristics. Written purchasing conformance is a conditional commercial implication. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR2-datasheet-xx.xx.pdf))

[E596] The April 2026 FOR2 datasheet gives a maximum free-rosin specification of xx.xx% but a typical value of xx.xx%. This directly demonstrates that a specification ceiling and typical composition can fall on opposite sides of the chosen cutoff. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR2-datasheet-xx.xx.pdf))

[E597] The April 2026 FOR2 disclosure reports a xx.xx% maximum free-rosin specification but a xx.xx% typical value. Those figures straddle the chosen xx.xx% cutoff and demonstrate why a grade name, ceiling or typical value cannot allocate every shipment. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR2-datasheet-xx.xx.pdf))

Forchem - FOR2 Product Datasheet, PDS FOR2 007, April 2026

[E598] The April 2026 FOR2 document reports xx.xx% typical rosin and a xx.xx% maximum, supporting the low-band example while exposing cutoff-attribution uncertainty; it does not disclose 2025 sales.

FOR2X Product Datasheet - April 2026

[E599] The April 2026 FOR2X document identifies the named TOFA offering and claims improved cold performance. It supports supplier positioning, not independently demonstrated superiority or a purchaser's replacement approval. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR2X-datasheet-xx.xx.pdf))

FOR5 Product Datasheet, April 2026 - Forchem

[E600] FOR5 is explicitly TOFA with a differentiated fatty-acid and rosin-acid balance, including an advertised alkyd-resin application. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E602] Forchem's April 2026 FOR5 document places responsibility for respecting third-party intellectual-property rights in the buyer's activities on the buyer. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E605] The April 2026 FOR5 document classifies the product as TOFA and names metalworking fluids, oilfield chemicals, soaps, cleaners and alkyd resins as applications. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E606] The April 2026 FOR5 document expressly classifies FOR5 as TOFA, names potential industrial applications and disclaims suitability warranties. Only its commercial classification and terms support the profile. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E608] The April 2026 delivery offering lists tank-based formats and IBC containers, without establishing a destination-specific order commitment. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E610] The datasheet advertises FOR5 for metalworking fluids, oilfield chemicals, soaps, cleaners and alkyd resins. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E612] The document assigns responsibility for respecting third-party intellectual-property rights to the buyer; the distinction between material purchase and downstream rights is an analytical implication. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

Forchem - FOR5 Product Datasheet, PDS FOR5 003, April 2026

[E601] FOR5's typical xx.xx% rosin and xx.xx% fatty acids establish a higher-band commercial example within the working parent boundary. Its applications do not establish shipment weights.

[E607] The April 2026 FOR5 offering includes tank-based delivery, supporting continued Bulk availability as a forecast premise rather than a forecast sales observation.

[E609] The April 2026 offering separately includes IBC containers, corroborating their ongoing commercial role without measuring adoption.

FOR5 Product Datasheet - PDS FOR5 003, April 2026

[E603] The April 2026 FOR5 datasheet identifies the product as TOFA and reports typical free-rosin and free-fatty-acid values of xx.xx% and xx.xx%. These illustrate higher-rosin material within the frozen parent boundary; they are typical characteristics, not guaranteed shipment minima. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E604] The April 2026 FOR5 disclosure identifies TOFA with typical free-fatty-acid and free-rosin contents of xx.xx% and xx.xx%. This corroborates an advertised higher-rosin example within the working identity boundary, not shipment-level allocation. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E611] The delivery offering includes road tankers, ISO tanks and flexitanks. Placing freight-scale flexitanks within Bulk is the working commercial-containment rule, not an additional supplier-defined taxonomy axis. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

[E613] The same TOFA offering separately lists IBC delivery, corroborating that format without establishing Global packaging shares. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/FOR5-datasheet-xx.xx.pdf))

Forchem Sustainability Report 2025

[E614] EUR xx.xx turnover anchors the explicitly assumed TOFA and Finnish-destination portions.

[E615] Forchem's 2025 sustainability report describes its TOFA portfolio and European sales offices, supporting a producer-controlled selling organization without establishing the route of every sale. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/Forchem_sustainability-report-2025-ENG-LOWRES-xx.xx.pdf))

[E616] Reported EUR xx.xx 2025 turnover and the multiproduct portfolio constrain the scale check; the TOFA revenue fraction remains assumed. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/Forchem_sustainability-report-2025-ENG-LOWRES-xx.xx.pdf))

[E617] Reported turnover and the multiproduct portfolio constrain the assumed TOFA calibration pool; they do not quantify ISCC PLUS sales.

[E618] Supplier turnover constrains the Finnish domestic component within the European model.

[E619] The 2025 report distinguishes TOFA from DTO, rosin and pitch, reports EUR xx.xx turnover and identifies certified upstream sourcing. These are boundary and supplier-scale inputs, not outgoing certification shares.

[E620] The company's 2025 report identifies tall oil fatty acids within its portfolio, industrial customers, and three sales offices in addition to its production location. This corroborates a producer-controlled selling organization; it does not

disclose the direct-versus-intermediated share of TOFA sales. ([forchem.com](https://www.forchem.com/wp-content/uploads/2026/xx.xx/Forchem_sustainability-report-2025-ENG-LOWRES-xx.xx.pdf))

[E621] The same supplier-scale calibration supports the common parent budget. Upstream certification is not interpreted as universal outgoing claim transfer.

Talloil - Gioma Varo

[E622] Gioma Varo explicitly distinguishes a tall-oil fatty-acid offering from distilled tall oil. ([giomavaro.it](https://www.giomavaro.it/talloil/))

[E623] Gioma Varo's Talloil page states that it offers a tall-oil fatty-acid product separately from a distilled tall-oil product.

[E624] The fatty-acid offering is identified as TALL OIL ACID with CAS xx.xx-xx.xx-xx.xx.

Federal Register, Volume 65, Number 211, October 31, 2000

[E625] EPA's discussion on page xx.xx identifies TOFA as a source material for dimer acids, trimer acids and chemically distinct derivatives. This supports an intermediate-output category without treating downstream derivative sales as TOFA sales. ([govinfo.gov](https://www.govinfo.gov/content/pkg/FR-2000-xx.xx-xx.xx/pdf/FR-2000-xx.xx-xx.xx.pdf))

U.S. Census Bureau - Product Summary: 2002, EC02-31SP-1

[E626] Table xx.xx printed page xx.xx supplies historical low-band shipment values and quantities used as allocation primitives, not current global observations; coverage includes interplant transfers.

[E627] The separately valued higher-rosin product code supplies the historical sibling weight and the 1997 sensitivity anchor.

Tall Oil Fatty Acid Supplier - GreenChem Industries

[E628] GreenChem identifies a TOFA supplier-distributor role and commercial inquiry route for industrial buyers. ([greenchemindustries.com](https://www.greenchemindustries.com/chemical/xx.xx/tall-oil-fatty-acid))

Tall Oil Fatty Acid Supplier | CAS 61790-12-3 | GreenChem

[E629] Identifies GreenChem Industries as a TOFA supplier and distributor serving industrial buyers.

[E630] Provides a commercial quotation route and advertises bulk supply.

Ácidos Grasos de Tall Oil - Gustav Heess Supplier-Identification Document

[E631] The legacy supplier-identification document names Gustav Heess, S.L. for a tall-oil fatty-acid product, not current order fulfillment. ([gustavheess.com](https://www.gustavheess.com/wp-content/uploads/2017/xx.xx/6113seg.pdf))

ÁCIDOS GRASOS DE TALL OIL - Supplier-identification document

[E632] The supplier-identification section names GUSTAV HEESS, S.L., a Spanish address, and product xx.xx Ácidos Grasos de Tall Oil.

[E633] This legacy supplier document does not establish current catalog continuity or sales.

Contact Us - Harima Chemicals Group

[E634] Harima expressly lists tall oil fatty acids in its Resins and Tall Oil Products commercial inquiry category. This connects the protected group identity to a TOFA inquiry route without identifying every selling affiliate. ([harima.co.jp](https://www.harima.co.jp/en/contact/))

Harima Chemicals Group : Contact Us

[E635] Harima's official commercial inquiry page expressly lists tall oil fatty acids among its resins and tall-oil products.

Harima Chemicals Group Annual Report - Year Ended March 31, 2025

[E636] JPY xx.xx Resin & Tall Oil Products revenue anchors explicit TOFA-scope, exchange-rate and Japanese-destination assumptions.

[E637] Japanese segment revenue constrains a domestic merchant-sales bridge within the regional allocation.

Harima Chemicals Group - Annual Report, Year Ended March 31, 2025

[E638] The business overview reports JPY xx.xx Resin & Tall Oil Products sales for the year ended March xx.xx 2025; product and calendar-year adjustments remain modeled. ([harima.co.jp](https://www.harima.co.jp/en/ir/pdf/annual_e24.pdf))

Harima Chemicals Group - Integrated Report 2025

[E639] The report distinguishes LAWTER from the Resin & Tall Oil Products business, supporting the control against automatically adding downstream or affiliate revenue. ([harima.co.jp](https://www.harima.co.jp/en/ir/pdf/integrated_e25.pdf))

Harima Acquires ISCC Certification - February 3, 2025

[E640] Harima describes U.S. CTO procurement and transport to Japan through named affiliate roles, supporting the origin-versus-processing distinction. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E642] Harima's February xx.xx 2025 announcement describes US crude tall oil procurement and transport to Japan. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E643] Harima's February xx.xx 2025 announcement identifies U.S. crude tall oil procurement and transport to Japan, supporting the distinction between processing location and upstream origin. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E644] Harima's February xx.xx 2025 disclosure describes U.S. crude tall oil procurement and transport to Japan, supporting the distinction between processing geography and upstream origin. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E645] Harima's February xx.xx 2025 disclosure describes U.S. crude tall oil procurement supporting an affiliate chain in Japan. Processing location therefore does not establish independent upstream geography. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E646] Harima's February xx.xx 2025, announcement identifies U.S. CTO procurement and transport to Japan, Harima M.I.D.'s joint venture with International Paper, downstream Harima Chemicals roles and announced ISCC EU and PLUS certification. It does not allocate every merchant offering or transaction claim. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E647] The February xx.xx 2025 announcement identifies distinct affiliate roles in U.S. sourcing and Japanese activity; it does not measure merchant TOFA sales. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

[E649] The announcement identifies Harima USA, the Harima M.I.D. joint venture with International Paper, and Harima Chemicals as different participants in the documented chain. ([harima.co.jp](https://www.harima.co.jp/en/newsroom/2025/xx.xx.html))

Harima Chemicals Group : NEWSROOM

[E641] Harima's 2025 certification announcement identifies Harima USA, Harima M.I.D., and Harima Chemicals within its tall-oil supply chain.

[E648] The announcement identifies Harima M.I.D. as a joint venture with International Paper and describes fatty acids among its tall-oil outputs.

Reason for the change in Representative Directors and Other Officers

[E650] The notice documents continuing corporate governance activity at the protected group reporting level.

[E651] The retrieved notice is dated April xx.xx 2026 and identifies Harima Chemicals Group, Inc. and its Tokyo Stock Exchange listing.

Tall Oil Fatty Acid (TOFA) - Henry Franc Sales Agency

[E652] Henry Franc markets TO-xx.xx and TO-xx.xx as TOFA but gives different material identifiers; it identifies Lascaray-related dispatch arrangements. ([henryfranc.com](https://www.henryfranc.com/en/products/oleochemicals-plant-chemistry/fatty-acids/tall-oil-fatty-acid/))

[E653] Henry Franc's TOFA page connects its agency business to European TOFA sales and Lascaray-related dispatch arrangements. This does not establish an available mandate for another entrant. ([henryfranc.com](https://www.henryfranc.com/en/products/oleochemicals-plant-chemistry/fatty-acids/tall-oil-fatty-acid/))

[E654] Henry Franc's dedicated TOFA offering connects its separately documented agency model to this market and describes producer-site or logistics-platform delivery. ([henryfranc.com](https://www.henryfranc.com/en/products/oleochemicals-plant-chemistry/fatty-acids/tall-oil-fatty-acid/))

[E655] The TOFA-specific offering connects the separately disclosed producer-agency model to this market. Its commercial obligations remain order-specific. ([henryfranc.com](https://www.henryfranc.com/en/products/oleochemicals-plant-chemistry/fatty-acids/tall-oil-fatty-acid/))

Tall Oil Fatty Acid (TOFA) - HENRY FRANC S.A.S - Sales Agency

[E656] The agency's dedicated TOFA page offers a product identified as CAS xx.xx-xx.xx-xx.xx and describes deliveries from the producer's site or a logistics platform, connecting its independently documented agency business model to TOFA. ([henryfranc.com](https://www.henryfranc.com/en/products/oleochemicals-plant-chemistry/fatty-acids/tall-oil-fatty-acid/))

[E657] The commercial offering quotes xx.xx kg IBCs, anchoring the modeled consignment mass; the assumed number of units and orders is not disclosed.

[E658] The dedicated TOFA offering lists drums, IBCs, and tank trucks, independently corroborating the three principal identified supply formats. The page also lists an adjacent grade, which is not automatically included in the frozen TOFA boundary. ([henryfranc.com](https://www.henryfranc.com/en/products/oleochemicals-plant-chemistry/fatty-acids/tall-oil-fatty-acid/))

[E659] The offering quotes xx.xx kg drums, supplying the drum-mass proxy and the independently derived five-to-one IBC/drum mass relationship.

Henry Franc - Independent Industrial Sales Agency

[E660] Henry Franc describes a producer sales-agency model without resale, leaving delivery and customer invoicing with its producer principals. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

[E661] Henry Franc describes an industrial sales-agency model distinct from resale, supporting comparison with a distributor's fulfillment role. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

[E662] Henry Franc describes itself as an external producer sales force that does not resell or trade; producer principals deliver and invoice end customers. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

[E663] Henry Franc expressly operates as a producer sales agency rather than a reseller; its principals deliver and invoice customers directly. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

[E664] Henry Franc states that it operates as an external sales force, does not resell or trade, and leaves delivery and customer invoicing to producer principals. This supports the producer-agency distinction, not an order-specific commitment. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

[E666] The disclosed agency model keeps delivery and invoicing with producers, supporting a conditional comparison with an entrant undertaking resale obligations. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

Henry Franc - Independent industrial sales agency

[E665] The agency describes itself as an external sales force for producers and explicitly states that it does not resell or trade; producers set prices, deliver, and invoice end clients. This provides a commercial example distinguishing agency-mediated sales from title-taking resale. ([henryfranc.com](https://www.henryfranc.com/en/who-are-we/))

Acides gras - Achat / Vente en direct producteur - HENRY FRANC S.A.S

[E667] Henry Franc's fatty-acids portfolio identifies Lascaray as its producer relationship, includes TO-xx.xx and TO-xx.xx and describes Lascaray's Vitoria production location and Barcelona logistics platform. ([henryfranc.com](https://www.henryfranc.com/fr/produits/oleochimie-chimie-vegetale/acides-gras/))

ACIDE GRAS DE TALL OIL - Achat / Vente - HENRY FRANC S.A.S

[E668] Henry Franc SAS states that it markets tall oil fatty acids in Europe and lists TO-xx.xx and TO-xx.xx.

[E669] Henry Franc identifies Lascaray as the supply origin for its advertised tall-oil grades and describes a Spanish dispatch route.

[E670] Henry Franc markets TO-xx.xx and TO-xx.xx as TOFA in Europe but assigns them different material identifiers. That observation supports preserving an offering-specific identity verification condition; it does not establish buyer-approved equivalence. ([henryfranc.com](https://www.henryfranc.com/fr/produits/oleochimie-chimie-vegetale/acides-gras/acide-gras-de-tall-oil/))

[E671] Henry Franc's European TOFA offering connects the agency business to this market and describes Lascaray-related dispatch arrangements; it does not establish an available mandate for another entrant. ([henryfranc.com](https://www.henryfranc.com/fr/produits/oleochimie-chimie-vegetale/acides-gras/acide-gras-de-tall-oil/))

[E672] The TOFA page advertises drums, Intermediate Bulk Containers and tank trucks, with dispatch from Lascaray's Vitoria location or Barcelona logistics platform. These descriptions do not establish a binding grade-and-destination

commitment.
([henryfranc.com](https://www.henryfranc.com/fr/produits/oleochimie-chimie-vegetale/acides-gras/acide-gras-de-tall-oil/))

[E673] The page provides a French business address and describes dispatch from Lascaray's Vitoria production location or a Barcelona logistics platform.

[E674] The page provides a specific commercial channel connection rather than only a general distributor reference.

TOFA Fatty Acids Supplier UK - H Foster

[E675] H Foster advertises domestic TOFA supply and delivery from established manufacturers; these remain supplier representations rather than accepted order obligations.
([hfoster.co.uk](https://www.hfoster.co.uk/products/Tofa%20Fatty%20Acids))

Tofa Fatty Acids Supplier UK H Foster

[E676] H Foster's inspected TOFA page advertises dependable stock and UK delivery for the specific product.

[E677] H Foster's product page advertises TOFA fatty acids and UK delivery.

[E678] The page identifies H Foster xx.xx Ltd., its English registration jurisdiction, and UK business locations.

[E679] The product page describes sourcing from established manufacturers, supporting a local supply-channel role rather than TOFA production ownership.

UK REACH Roles - Health and Safety Executive

[E680] HSE describes Great Britain-specific UK REACH roles, including appointment of an eligible GB-based Only Representative to fulfill importer obligations. ([hse.gov.uk](https://www.hse.gov.uk/reach/roles.htm))

[E681] HSE describes Great Britain-specific UK REACH roles, supporting the limit to transferring an EU arrangement across EMEA. ([hse.gov.uk](https://www.hse.gov.uk/reach/roles.htm))

[E682] HSE distinguishes a GB-based Only Representative fulfilling importer obligations from a distributor without importer responsibilities. ([hse.gov.uk](https://www.hse.gov.uk/reach/roles.htm))

[E683] HSE identifies separate UK REACH business roles and the option for an eligible non-GB manufacturer to appoint a GB-based Only Representative. ([hse.gov.uk](https://www.hse.gov.uk/reach/roles.htm))

Global Energy Review 2026 - Oil - International Energy Agency

[E684] Flat advanced-economy road-fuel demand in 2025 provides counterevidence to automatic additive-volume expansion. ([iea.org](https://www.iea.org/reports/global-energy-review-2026/oil))

[E685] Observed subdued 2025 oil-demand growth constrains aggressive oilfield activity assumptions; it is not a direct TOFA allocation weight. ([iea.org](https://www.iea.org/reports/global-energy-review-2026/oil))

Oil 2025 - Executive Summary - International Energy Agency

[E686] The dated upstream-investment outlook supplies a counterforce to sustained oilfield demand growth, without measuring chemical purchases. ([iea.org](https://www.iea.org/reports/oil-2025/executive-summary))

[E687] The medium-term gasoline/diesel outlook supports a cautious additive activity scenario rather than extrapolated fuel growth. ([iea.org](https://www.iea.org/reports/oil-2025/executive-summary))

NOSOTROS | iiq

[E688] IIQ describes its business as importing, distributing, and commercializing chemical raw materials.

[E689] Its history identifies the Insumos a la Industria Química, S.A. de C.V. name and a commercial focus in northeastern Mexico.

Ácidos Grasos de Tall Oil - IIQ

[E690] IIQ's catalog lists tall-oil fatty acids and identifies Insumos a la Industria Química SA de CV in Mexico. ([iiq.com.mx](https://www.iiq.com.mx/product-page/acidos-grasos-de-tall-oil))

Ácidos Grasos de Tall Oil | iiq

[E691] The official catalog lists Ácidos Grasos de Tall Oil.

[E692] The page identifies Insumos a la Industria Química SA de CV and a business address in García, Nuevo León, Mexico.

Ilim Group Corporate Presentation

[E693] Ilim Group's corporate presentation lists tall oil fatty acids in its forest-chemicals product portfolio.

[E694] Ilim's corporate presentation provides portfolio context but does not settle a proposed TOFA transaction's current producing and contracting entities. ([ilimgroup.com](https://www.ilimgroup.com/upload/pdf/company/ilim-presentation-en.pdf))

[E695] The presentation identifies the group's Russian mill locations; it does not separately establish TOFA sales by destination.

What Is the Inventory and Who Must Use It? - AICIS

[E696] AICIS states that applicable industrial chemical introduction requires business registration and determination of the introduction category, beginning with the Inventory. ([industrialchemicals.gov.au](https://www.industrialchemicals.gov.au/business/getting-started-registration-importing-and-manufacturing/what-inventory-and-who-must-use-it))

Pavement Technologies - Ingevity

[E697] Ingevity's pavement portfolio identifies Evotherm warm-mix additives and Indulin emulsifiers. These establish downstream offerings; the document does not attribute TOFA purchasing to each individual brand. ([ingevity.com](https://www.ingevity.com/uploads/market-pdfs/PavementTechnologiesGeneral.pdf))

Tall Oil Fatty Acid - Insta Chemi Private Limited

[E698] Insta Chemi's catalog offers TOFA through a quotation route, without resolving transaction-specific upstream responsibility. ([insta-chemi.com](https://www.insta-chemi.com/oleic-acid.html))

Oleic Acid - Tall Oil Fatty Acid Manufacturer from Noida

[E699] The official catalog identifies Insta Chemi Private Limited in Noida, Uttar Pradesh, India.

[E700] The page offers Tall Oil Fatty Acid through a wholesale-trader quotation route and describes the offered product as imported.

ISCC PLUS 203-1 - Traceability, Version 1.1

[E701] ISCC PLUS links sustainability declarations to specific delivered batches and sustainability characteristics. It also requires records covering certified and non-certified quantities and safeguards against multiple accounting across schemes. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-1_Traceability_v1.xx.xx.pdf))

[E702] Only the certified part of a mixed product belongs in the declaration's certified quantity. This supports documented quantity splitting rather than assigning an entire delivery to ISCC PLUS. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-1_Traceability_v1.xx.xx.pdf))

[E703] Permitted alternative documentation in specified circumstances means absence of a sustainability declaration alone does not prove absence of transferred certification.

[E704] The declaration must identify the covered certified quantity. Where a delivery contains certified and non-certified portions, only its certified portion belongs in the declared certified amount. Mass-balance documentation does not necessarily describe segregated physical content. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-1_Traceability_v1.xx.xx.pdf))

[E705] The standard links declarations to delivered batches, distinguishes certified portions of mixed deliveries, and allows relevant alternative documentation in specified noncertified-client circumstances. Absence of a sustainability declaration alone therefore cannot establish absence of a transferred claim. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-1_Traceability_v1.xx.xx.pdf))

[E706] The standard separately records certified and non-certified incoming and outgoing material. This supports an explicit no-transfer accounting distinction but does not establish TOFA-specific transactions in that category. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-1_Traceability_v1.xx.xx.pdf))

[E707] The standard separately records certified and noncertified material. Applying that distinction to a no-certification-transfer category is an accounting adaptation, not evidence of TOFA-specific transactions without any transferred certification. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-1_Traceability_v1.xx.xx.pdf))

[E708] Traceability rules associate certified quantities with delivered consignments and distinguish certified portions, supporting quantity-based rather than whole-company claim attribution.

ISCC PLUS 203-2 - Chain of Custody, Version 1.1

[E709] ISCC PLUS xx.xx-xx.xx distinguishes physical segregation, controlled blending and mass balance and prohibits multiple accounting of sustainability characteristics. Transaction-specific claim verification is the commercial implication. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-2_Chain-of-Custody_v1.xx.xx.pdf))

[E710] ISCC PLUS recognizes multiple chain-of-custody methods, supporting inclusion of valid mass-balance claims without creating a separate premium-quality category. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-2_Chain-of-Custody_v1.xx.xx.pdf))

[E711] ISCC PLUS recognizes physical segregation, controlled blending and mass balance. A documented PLUS claim is therefore not automatically a segregated-material or premium-quality category. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-2_Chain-of-Custody_v1.xx.xx.pdf))

[E712] Restrictions on multiple accounting support mutually exclusive outgoing scheme attribution rather than counting the same sustainability characteristics under both EU and PLUS.

[E713] Separate accounting for certified characteristics supports transaction-based classification, without establishing a numerical no-transfer share.

[E714] The annex distinguishes EU and PLUS acceptance and claims. Classifying by the outgoing transaction rather than an upstream certificate is an analytical application of that distinction; it does not establish current TOFA shipment claims. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-2_Chain-of-Custody_v1.xx.xx.pdf))

[E715] The scheme document distinguishes physical segregation, controlled blending, and mass balance as chain-of-custody methods. Certification coverage therefore should not be treated as a chemical-quality tier or automatic proof of physically segregated supply. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-2_Chain-of-Custody_v1.xx.xx.pdf))

[E716] The standard recognizes multiple custody methods, including mass balance. PLUS therefore is not automatically physically segregated material or a distinct chemical-quality tier.

[E717] The standard, valid from November xx.xx 2025, prohibits multiple accounting of sustainability characteristics and requires attention to other schemes used. Corporate participation in two schemes therefore does not establish two allocations of the same TOFA quantity. ([iscc-system.org](https://www.iscc-system.org/wp-content/uploads/2025/xx.xx/ISCC_PLUS_203-2_Chain-of-Custody_v1.xx.xx.pdf))

Company Profile - Fujian Shaxian Jinlong Xiangliao Huagong Youxian Gongsi

[E718] The company describes producing and selling TOFA separately from DTO and other forest-chemical products. ([jlxlchem.com](https://www.jlxlchem.com/about))

关于我们 - 沙县金龙香料化工官网

[E719] The company presents TOFA among its produced and sold forest-chemical products, separately from distilled tall oil and tall-oil pitch.

[E720] The official business profile identifies 福建沙县金龙香料化工有限公司 in Shaxian, Fujian, China.

Product Center - Chuzhou Kanghua Dianzi Cailiao Youxian Gongsi

[E721] Chuzhou Kanghua's lubricant-additive portfolio lists differentiated TOFA offerings, supporting a named-product inquiry. ([kanghuachem.com](https://www.kanghuachem.com/ProductsStd_003.html))

产品中心 - 滁州康华电子材料有限公司

[E722] The Chinese-language catalog identifies 滁州康华电子材料有限公司 and an address in Quanjiao County, Chuzhou, Anhui.

[E723] The catalog lists two TOFA grades under its lubricant-additive portfolio.

History - Lascaray S.A.

[E724] Lascaray's company history describes continuing family leadership and an oleochemical business focused on fatty acids and derivatives.

Location - Lascaray S.A.

[E725] Lascaray identifies its headquarters and production plant in Vitoria-Gasteiz, Spain, and a commercial office in Barcelona.

Tall Oil Fatty Acid - Lascaray S.A.

[E726] Lascaray lists TO-xx.xx and TO-xx.xx within its Tall Oil Fatty Acid portfolio and differentiates their rosin-acid content. The producer's classification supports retaining both marketed offerings for inquiry, without establishing contractual identity or interchangeability for a proposed purchase. ([lascaray.com](https://www.lascaray.com/en/products-lascaray-s-a/tall-oil-fatty-acid/))

[E727] Lascaray's Tall Oil Fatty Acid page lists TO-xx.xx and TO-xx.xx as distinct offerings. ([lascaray.com](https://www.lascaray.com/en/products-lascaray-s-a/tall-oil-fatty-acid/))

[E728] Lascaray's official Tall Oil Fatty Acid page lists TO-xx.xx and TO-xx.xx.

[E729] The page advertises uses including lubricants, detergents, printing inks, mining, and adhesives.

About | Mainstream Pine

[E730] It does not provide a named current TOFA product catalog.

[E731] The company-issued About page identifies the market-facing Mainstream Pine Products organization and management team.

Tall Oil Fatty Acid - Moller Chemist

[E732] Moller Chemist has a dedicated TOFA commercial page, while its operator and contracting identity require confirmation. ([mollerchemist.com](https://www.mollerchemist.com/product/tall-oil-fatty-acid/))

[E733] The Moller Chemist website advertises Tall Oil Fatty Acid through a dedicated commercial product page.

[E734] The page publishes a South African xx.xx contact number; this alone does not establish a registered business location.

Oils and Fatty Acid Cuts - Mosselman Product Chart

[E735] Mosselman's chart includes a named tall-oil fatty-acid category; the chart alone does not establish a new purchasing commitment. ([mosselman.eu](https://www.mosselman.eu/files/uploads/2020/xx.xx/mosselman-standard-values-xx.xx.pdf))

Oils & fatty acid cuts - fatty acid compositions (%)

[E736] Mosselman's official product chart includes a product category named Tall oil fatty acids N.

[E737] The chart alone does not establish current contracting identity, product availability, or manufacturer-versus-reseller attribution.

Neoquim Indústrias Químicas - Business and Markets

[E738] Neoquim describes manufacturing, resale and import activities; this does not assign a TOFA-specific manufacturing role. (neoquim.com.br)

Renewable raw materials - Neste

[E739] Neste identifies tall-oil-based fatty-acid capability within a broader raw-material portfolio; capability is not a TOFA purchasing commitment. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

[E740] Neste states that it can use crude-tall-oil-based fatty acids and describes a diversified renewable raw-material portfolio. Capability does not establish a TOFA sourcing commitment. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

[E741] Neste states that it can use crude-tall-oil-based fatty acids and describes a wider raw-material portfolio. Neither statement establishes a proposed TOFA purchase commitment. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

[E742] Neste states that it can use crude-tall-oil-based fatty acids and describes a wider renewable raw-material portfolio. Capability does not establish actual TOFA procurement or allocation. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

[E743] Neste states that it can use crude-tall-oil-based fatty acids and describes broader raw-material options. Capability does not establish a proposed TOFA purchase commitment. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

[E744] Neste's feedstock capability supports a potential alternative-outlet mechanism, while its broader portfolio challenges an assumption of unavoidable TOFA procurement. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

[E745] The offering record establishes a fuel-producer feedstock setting, supporting separate verification from additive and lubricant purchasing mandates. ([neste.com](https://www.neste.com/products-and-innovation/raw-materials/renewable-raw-materials))

Nordic Ecolabelling - Paints and Varnishes Consultation Responses, February 9, 2023

[E746] A historical Kraton submission states that every TOFA shipment to its European biofuel customers carried an ISCC declaration, supporting high conditional fuel-book transfer rather than universal global transfer.

[E747] The fuel-versus-paint distinction supports retaining transactions without transferred certification even when a producing site participates in a scheme.

[E748] The submission identifies additional administration and cost from extending declarations to paint customers, supporting differentiated industrial uptake assumptions.

Kraton and Nordmann expand their partnership

[E749] Announced an expanded Kraton pine-chemical and specialty-resin distribution relationship on April xx.xx 2024.

[E751] The announcement concerns a broader portfolio and does not specifically establish merchant TOFA supply.

Kraton and Nordmann Expand Their Partnership

[E750] Nordmann's April xx.xx 2024 announcement concerns expanded Kraton pine-chemical and specialty-resin distribution, not a blanket named-TOFA mandate. ([nordmann.global](https://www.nordmann.global/en/news-events/press-room/kraton-and-nordmann-expand-their-partnership))

NOURACID SE 45 - Oleon

[E752] Oleon advertises soybean-oil fatty acid NOURACID SE xx.xx for alkyd resins and paints, supporting an adjacent alternative to evaluate without establishing approved substitution. ([oleon.com](https://www.oleon.com/products-solutions/nouracid-se-xx.xx))

[E753] Oleon markets NOURACID SE xx.xx as a modified soybean-oil fatty acid for alkyd resins and architectural and decorative paints. Its role as a buyer-approved alternative is conditional analysis. ([oleon.com](https://www.oleon.com/products-solutions/nouracid-se-xx.xx))

[E754] Oleon markets NOURACID SE xx.xx a soybean-oil fatty acid, for alkyd resins and paints. This establishes an adjacent commercial alternative, not approved TOFA substitution. ([oleon.com](https://www.oleon.com/products-solutions/nouracid-se-xx.xx))

[E755] The named adjacent input supports substitution pressure in overlapping applications, without demonstrating interchangeability. ([oleon.com](https://www.oleon.com/products-solutions/nouracid-se-xx.xx))

[E756] The overlapping alkyd and paint applications provide a credible alternative to examine when assessing account contestability; buyer acceptance remains unestablished. ([oleon.com](https://www.oleon.com/products-solutions/nouracid-se-xx.xx))

Palmer Holland Partners With DRT In Lubricants Market

[E757] On June xx.xx 2020, Palmer Holland announced an exclusive agreement to sell DRT TOFA and DTO in the United States and Canada.

[E759] Palmer Holland's agreement identifies DRT as the supplier of TOFA and DTO under the Resinoline product line.

[E760] The announcement assigns Palmer Holland promotion and inventory management of the Resinoline product line.

Palmer Holland Partners With DRT in Lubricants Market

[E758] Palmer Holland's June xx.xx 2020 announcement identifies a DRT TOFA agreement for the United States and Canada and inventory-management responsibility. ([palmerholland.com](https://www.palmerholland.com/news-and-insights/palmer-holland-partners-with-drt))

Pasand Chemical - Tall Oil Fatty Acid for Diesel Fuel Lubricant

[E761] Pasand Chemical's official product page advertises Pasand TOFA for fuel-related and other industrial applications.

[E763] The company describes the offering as a blend and lists metalworking, oilfield, mining, and construction-chemical uses.

Tall Oil Fatty Acid for Diesel Fuel Lubricant - Pasand Chemical

[E762] Pasand describes Pasand TOFA as a blend and advertises fuel-related and other industrial applications. ([pasandrajkot.com](https://www.pasandrajkot.com/public/index.php/fatty-acids/distilled-tall-oil))

Lei nº 15.022, de 13 de Novembro de 2024

[E764] Brazil's Law xx.xx of November xx.xx 2024 establishes a national chemicals inventory framework and implementation provisions; the law itself does not establish clearance for an individual TOFA transaction. ([planalto.gov.br](https://www.planalto.gov.br/ccivil_03/_ato2023-2026/2024/lei/l15022.htm))

Univar Solutions Completes Transaction with Apollo Funds

[E765] The release states that the business would continue under the Univar Solutions name and brand, supporting the protected market-facing reporting identity.

[E766] This is dated ownership evidence, not a reconstruction of every subsequent ownership interest.

[E767] Univar Solutions' company-issued August xx.xx 2023 release confirms completion of its acquisition by Apollo Funds, with a minority investment from an Abu Dhabi Investment Authority subsidiary.

Univar Acquires Chemical Associates

[E768] The announcement identifies TOFA among Chemical Associates' oleochemical products, supporting treatment of that historical business within Univar rather than as a separately staged supplier.

[E769] Univar announced its acquisition of Chemical Associates' assets on July xx.xx 2015.

ResinOLINE BD 2 - Palmer Holland

[E770] Palmer Holland's Resinoline BD xx.xx catalog entry identifies DRT FRANCE as principal and the material as tall-oil fatty acids. This corroborates a marketed channel relationship without establishing a particular order or territorial mandate. ([products.palmerholland.com](https://www.products.palmerholland.com/products/resinoline-bd-xx.xx))

[E771] Palmer Holland's Resinoline BD xx.xx entry identifies DRT FRANCE as principal, connecting the branded material to a supplier relationship. ([products.palmerholland.com](https://www.products.palmerholland.com/products/resinoline-bd-xx.xx))

TALL OIL FATTY ACID L1-C - Quadra

[E772] Quadra identifies Fujian Shaxian SongChuan Chemical behind its Canadian L1-C listing, supporting a named supplier dependency. ([quadragroup.store](https://www.quadragroup.store/products/fujian-shaxian-songchuan-chemical-tall-oil-fatty-acid-l1-c))

[E773] Quadra names Fujian Shaxian SongChuan Chemical as the supplier of the Canada-available Tall Oil Fatty Acid L1-C offering.

[E774] Quadra's L1-C catalog entry identifies Fujian Shaxian SongChuan Chemical as the supplier and Canada as the region of availability. It supports a named-supplier Canadian catalog route, not confirmed transaction fulfillment. ([quadragroup.store](https://www.quadragroup.store/products/fujian-shaxian-songchuan-chemical-tall-oil-fatty-acid-l1-c))

[E775] Quadra's official catalog offers Tall Oil Fatty Acid L1-C and explicitly identifies regional availability in Canada.

[E776] The L1-C listing supports a Canada-specific inquiry, not extrapolated availability in other destinations. ([quadragroup.store](https://www.quadragroup.store/products/fujian-shaxian-songchuan-chemical-tall-oil-fatty-acid-l1-c))

[E777] This establishes a named channel-principal link, not independent verification of the principal's legal registration or manufacturing assets.

TALL OIL FATTY ACID L5 - Quadra

[E778] Quadra lists Tall Oil Fatty Acid L5 with explicit Canadian availability.

[E779] Quadra's L5 entry also identifies Fujian Shaxian SongChuan Chemical and Canadian availability, and lists bulk, drum and tote packaging. Separate grade entries therefore do not independently establish different upstream producers. ([quadragroup.store](https://www.quadragroup.store/products/quadra-tall-oil-fatty-acid-l5))

[E780] Quadra's L5 entry identifies the same supplier and Canadian availability, so another grade does not establish another producer. ([quadragroup.store](https://www.quadragroup.store/products/quadra-tall-oil-fatty-acid-l5))

[E781] Quadra's L5 listing identifies Fujian Shaxian SongChuan Chemical, specifies Canada and advertises bulk, drum and tote packaging. It is a product-specific inquiry route, not an accepted fulfillment commitment. ([quadragroup.store](https://www.quadragroup.store/products/quadra-tall-oil-fatty-acid-l5))

[E782] Quadra's L5 listing specifies Canada, names Fujian Shaxian SongChuan Chemical and advertises bulk, drum and tote packaging; it is not a binding fulfillment commitment. ([quadragroup.store](https://www.quadragroup.store/products/quadra-tall-oil-fatty-acid-l5))

[E783] The L5 catalog identifies Canada and advertised packaging, which still require an accepted destination-level commitment. ([quadragroup.store](https://www.quadragroup.store/products/quadra-tall-oil-fatty-acid-l5))

[E784] The L5 offering identifies Fujian Shaxian SongChuan Chemical as its supplier.

Company | Respol

[E785] Respol's company page identifies Forchem Oyj as part of Respol Group following its 2013 acquisition.

About | Rutteman

[E786] The company identifies its official name as G.C. Rutteman & Co. B.V. and describes importation, exportation, distribution, and international trade in renewable raw materials, including pine chemicals and fatty acids. ([rutteman.com](https://www.rutteman.com/about))

[E787] The company page supplies business-role context; it does not establish TOFA-specific production assets, sales, or inventory.

Tall Oil Fatty Acid - G.C. Rutteman & Co. B.V.

[E788] Rutteman maintains a dedicated TOFA product page supporting a portfolio-based commercial inquiry. ([rutteman.com](https://www.rutteman.com/products/tall-oil-fatty-acid))

Tall Oil Fatty Acid

[E789] The offering is listed separately from tall oil fatty acid ester and other tall-oil fractions in the company's portfolio.

[E790] The official portfolio contains a dedicated Tall Oil Fatty Acid product page and identifies G.C. Rutteman & Co. B.V. at a Rotterdam, Netherlands address. ([rutteman.com](https://www.rutteman.com/products/tall-oil-fatty-acid))

HOME CARE & INDUSTRIAL - Savannah

[E791] Savannah's official Home Care & Industrial portfolio lists Tall Oil Fatty Acids separately from Distilled Tall Oils.

[E792] The page describes Savannah as a supplier of specialty chemicals for home-care and industrial markets.

Kraton Corporation - Form 10-K for the year ended December 31, 2021

[E793] The filing establishes the Arizona Chemical acquisition and reports USD xx.xx of 2021 Performance Chemicals revenue, a broader financial check rather than TOFA-only sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/kra-xx.xx.htm))

Arizona Chemical Company - Form S-1/A, 2010

[E794] The company reports third-party TOFA sales for biodiesel conversion beginning in 2009; this establishes a historical commercial route, not its 2025 size. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/y82079a1sv1za.htm))

[E795] The filing reproduces the consultant-estimated 2009 global TOFA quantity and alkyd consumption proportion used as historical allocation inputs, not current merchant-sales observations. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/y82079a1sv1za.htm))

[E796] The historical dimer consumption estimate provides a starting scale for intermediate demand, requiring explicit current-period and external-sale adjustments. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/y82079a1sv1za.htm))

[E797] The historical fuel-additive consumption estimate anchors the modeled additive pool before current-period, merchant-attribution and price adjustments. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/y82079a1sv1za.htm))

Form S-1/A: Arizona Chemical business and industry disclosures, 2010

[E798] The mandatory registration statement reproduces a dated Arthur D. Little TOFA activity estimate used only as a historical proxy, not as an observed 2025 share. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/y82079a1sv1za.htm))

Ingevity Corporation - Form 8-K, March 8, 2018

[E799] Ingevity's March xx.xx 2018 filing confirms acquisition of Georgia-Pacific pine-chemical assets, including operations related to tall oil fatty acids.

[E800] The filing supports historical business attribution and cautions against treating legacy Georgia-Pacific pine-chemical references as a separate current producer.

Ingevity Corporation - Form 10-K for the year ended December 31, 2025

[E801] 2025 Pavement Technologies sales of USD xx.xx anchor the modeled procurement-spending bridge; purchasing intensity and global coverage are assumptions.

[E811] Pavement Technologies revenue, purchased-TOFA disclosure, volume/price effects and near-term outlook anchor the explicit construction input-spending bridge; they are not TOFA sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E812] Purchased TOFA is identified as relevant to pavement technologies, supporting chemical-manufacturer rather than automatic contractor attribution.

[E813] Reported 2025 discontinued-business net sales of USD xx.xx and the January xx.xx 2026 closing date anchor the model's scale and ownership period, not its assumed TOFA fraction. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E819] The documented upstream purchasing role constrains construction attribution; finished pavement-product sales are not contractor TOFA purchases.

Ingevity Corporation Form 10-K for the year ended December 31, 2025

[E802] Ingevity discloses the risk of being unable to pass increased raw-material costs to customers; automatic recovery is not established. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E803] Ingevity identifies TOFA among purchased inputs and connects its availability with Pavement Technologies. Specified retained-business licenses do not establish a current external TOFA offering. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E804] Ingevity identifies TOFA among purchased raw materials and connects its availability with the pavement technologies business, establishing a documented chemical-manufacturer purchasing role. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E805] Ingevity identifies purchased TOFA and connects procurement exposure with its pavement technologies business, documenting a chemical-manufacturer purchasing role. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E806] Ingevity identifies purchased TOFA as relevant to Pavement Technologies, establishing a named raw-material purchasing role rather than a contractor purchasing mandate. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E807] Ingevity's 2025 Form xx.xx-K identifies TOFA among purchased raw materials and links its procurement to pavement technologies, establishing a named industrial-chemical purchasing role. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E808] Ingevity's filing records completion of the specified North Charleston refinery and Industrial Specialties divestiture to Mainstream on January xx.xx 2026. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E809] Ingevity's mandatory filing records completion of the North Charleston refinery and specified Industrial Specialties divestiture on January xx.xx 2026; it does not establish individual customer fulfillment performance. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E810] Multiproduct discontinued-operation revenue constrains commercial scale but is not TOFA-only US demand; ownership transition does not add a physical source.

[E814] Supplier retrenchment and asset continuity qualify the regional domestic-sales and forecast assumptions.

[E815] The annual filing describes intellectual-property transfers, specified licenses back for retained Ingevity businesses and reciprocal arrangements supporting the co-located operations. These distinguish acquired assets from all historical product and service responsibilities. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E816] The completed ownership event supports confirming post-transfer counterparties, without establishing subsequent fulfillment performance. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E817] The disclosed TOFA purchasing role supports conversion-stage account screening, not an open award or willingness to replace an incumbent. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E818] The divestiture documents an asset-transfer participation route; it does not establish commercial viability for another entrant. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E820] The filing establishes Mainstream's refinery acquisition, retained-business distinctions and Ingevity's TOFA purchasing role. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E821] The filing identifies an inability to recover increased raw-material costs from customers as a business risk. It does not establish automatic TOFA cost pass-through.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E822] The filing identifies raw-material procurement and inability to pass increased input costs to customers as business risks; it does not establish universal TOFA cost recovery.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E823] The refinery transfer closed January xx.xx 2026; counterparty remapping is the stated commercial implication.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

Ingevity Corporation Form 10-Q - Quarter Ended June 30, 2026

[E824] Ingevity identifies Mainstream Pine Products, LLC as purchaser of the North Charleston refinery and specified Industrial Specialties assets and records completion on January xx.xx 2026. The transaction concerns an existing asset base. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E826] Ingevity's June 2026 filing records the North Charleston divestiture to Mainstream on January xx.xx 2026 and distinguishes transition services from reciprocal operating arrangements.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E827] North Charleston's disclosed arrangements separate ownership, licensed rights, operating support and environmental liabilities. These are commercial diligence categories, not proof that another asset investment is attractive. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E829] The North Charleston arrangements include intellectual-property licenses, reciprocal operating services and environmental indemnities, supporting a separate ownership investment case.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E830] The completed transfer and continuing intercompany arrangements support a conditional counterparty-and-service disruption scenario, not a claim of an actual interruption.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E831] The disclosed transaction includes operating relationships, intellectual-property arrangements and environmental indemnities, supporting a distinction between asset ownership and commercial channel entry.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E833] The filing records completion of the existing refinery's transfer to Mainstream on January xx.xx 2026. It does not provide a current named merchant-grade offer or continuing channel mandate.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E834] The filing records the January xx.xx 2026, Industrial Specialties divestiture and identifies Pavement Technologies as the retained business within the renamed segment.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

Ingevity Corporation - Form 10-Q, quarter ended June 30, 2026

[E825] Ingevity reports the Industrial Specialties divestiture as completed on January xx.xx 2026 and presents the transferred business as discontinued operations.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E828] Specified retained-business intellectual property rights do not, by themselves, establish continuing external TOFA sales.

[E832] The filing identifies Mainstream Pine Products, LLC as the Delaware purchaser of the North Charleston refinery and specified Industrial Specialties business, with completion on January xx.xx 2026. This establishes the closing date rather than the January xx.xx announcement date.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/ngvt-xx.xx.htm))

[E835] The filing reports transferred business intellectual property and a license back for specified retained Ingevity businesses, but does not enumerate current merchant TOFA grades.

Company Overview・Global Network | Shima Trading Co., LTD.

[E836] The official English company overview establishes the Shima Trading market-facing English identity and Japanese business network.

Lubricity-Improver Product Portfolio - Shima Trading

[E837] Shima Trading lists L-xx.xx as tall-oil fatty acid; the legacy principal association requires confirmation following the refinery transfer. ([shima-tra.co.jp](https://www.shima-tra.co.jp/products/detail/xx.xx))

極圧添加剤|_油性向上剤 | 島貿易株式会社

[E838] Shima Trading's official Japanese catalog lists L-xx.xx as tall oil fatty acid.

[E839] The catalog attributes L-xx.xx to Ingevity, supporting an advertised channel offering but not a current post-transaction mandate.

Жирные кислоты таллового масла (ЖКТМ) - Сиблес

[E840] Sibles has a specific official catalog page offering tall oil fatty acids for wholesale purchase.

[E842] The site identifies the business as ООО «Сиблес» and gives a Saint Petersburg, Russia business address.

Tall Oil Fatty Acids - Sibles

[E841] Sibles maintains a specific TOFA commercial page; producer identity and destination access remain separate purchasing questions. ([sibbles.net](https://www.sibbles.net/ZHirnie-kisloti-tallovogo-masla-ZHKTM/))

Tall Oil Fatty Acid Supplier - Silver Fern Chemical

[E843] Silver Fern's TOFA page supplies a commercial inquiry and advertised U.S. distribution context, not independently verified production origins. ([silverfernchemical.com](https://www.silverfernchemical.com/chemical-supplier-xx.xx-xx.xx-xx.xx/tall-oil-fatty-acid-distributor-xx.xx.aspx))

Tall Oil Fatty Acid Supplier | 61790-12-3 | Your Reliable Distributor Silver Fern

[E844] Silver Fern's official catalog advertises Tall Oil Fatty Acid with a commercial inquiry route.

[E845] The product page identifies distribution locations across the United States.

Tall Oil Fatty Acid - S. R. CHEMICAL

[E846] S. R. CHEMICAL's TOFA catalog association retains a product-classification inconsistency requiring reconciliation before a dependable offering comparison. ([srchemical.net.in](https://www.srchemical.net.in/tall-oil-fatty-acid-xx.xx.html))

Tall Oil Fatty Acid Supplier,Tall Oil Fatty Acid Manufacturer in Kalol

[E847] S. R. CHEMICAL's official catalog advertises Tall Oil Fatty Acid and an All India domestic market.

[E848] The catalog also labels the product an inorganic acid, creating a product-classification inconsistency that requires corroboration.

Taaleri and HitecVision Complete the First Stage of Fintoil's Financing Round - August 28, 2026

[E849] Taaleri's August xx.xx 2026 announcement confirms completion of Fintoil's first financing stage and separately describes additional investment commitments. ([sttinfo.fi](https://www.sttinfo.fi/announcement/xx.xx?publisherId=xx.xx))

[E851] Taaleri's August xx.xx 2026, announcement identifies the operating Hamina business, confirms completion of the financing round's first stage after required conditions and distinguishes additional investment commitments from that completed stage. ([sttinfo.fi](https://www.sttinfo.fi/announcement/xx.xx?publisherId=xx.xx))

Taaleri ja HitecVision toteuttavat Fintoilin rahoituskierroksen ensimmäisen 75 miljoonan euron sijoituksen | Taaleri Oyj

[E850] Taaleri's August xx.xx 2026 announcement states that the first tranche of Fintoil's financing round with HitecVision had closed after the required approvals and other closing conditions were satisfied.

[E852] The announcement supports continuing operations and distinguishes the completed first tranche from additional committed financing.

Products - Sunpine

[E853] Sunpine's inspected portfolio lists raw tall diesel, bio-oil, rosin, alpha-pinene, and excess heat.

[E854] Sunpine's published portfolio lists raw tall diesel, bio-oil, rosin, alpha-pinene and excess heat rather than establishing a separate merchant TOFA offer. ([sunpine.se](https://www.sunpine.se/en/products/))

[E855] The inspected portfolio does not establish a separately marketed TOFA product.

PAMOLYN™ 240 Fatty Acid - Technical Data Sheet

[E856] Identifies Synthomer Adhesive Technologies as the business contact for the advertised product.

[E858] The March xx.xx 2025 product document identifies PAMOLYN xx.xx as a fatty-acid blend entirely sourced from TOFA.

PAMOLYN 240 Fatty Acid - Technical Data Sheet

[E857] Synthomer describes PAMOLYN xx.xx as a specialty fatty-acid blend derived wholly from a TOFA source. ([synthomer.com](https://www.synthomer.com/Media/tds/PAMOLYN%xx.xx%20Fatty%20Acid.pdf?revision=xx.xx))

OLEOCHEMICALS | TriStar

[E859] The official oleochemical portfolio expressly offers Tall Oil Fatty Acid.

[E860] The page identifies TRISTAR (Pty) Ltd and publishes two Durban-area business addresses in South Africa.

Oleochemicals - TriStar

[E861] TriStar lists TOFA within its oleochemical portfolio and identifies its Durban, South Africa business location; availability elsewhere in Africa is not established. ([tristarafrica.co.za](https://www.tristarafrica.co.za/oleochemicals/))

The Future of Chemical and Ingredient Distribution - Univar Solutions

[E862] Univar reports using AI tools to expand reach and collaboration. This is a company-level adoption statement rather than evidence of a particular TOFA workflow or outcome. ([univarsolutions.com](https://www.univarsolutions.com/future-of-distribution))

Tall Oil Fatty Acid (TOFA) - Univar Solutions

[E863] Advertised packaging infrastructure supports an intermediary service route, but does not show whether packaging precedes or follows the first external sale.

[E864] Distributor packaging capabilities are a commercial-access premise, not evidence of producer-origin drum volumes or a reason to count resale revenue again.

[E865] Metalworking uses support commercial presence; direct fabricator procurement remains an assumption.

[E866] Ore-flotation applications support a mining commercial setting while leaving operator-versus-formulator attribution modeled.

[E867] Packaging and regional delivery are advertised TOFA services. Their incremental buyer benefit depends on the accepted contractual commitment. ([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E868] Rubber and tire processing uses support the category premise, not a volume allocation based on product listings.

[E869] TOFA oilfield and lubricant offerings support commercial-category premises, not observed raw-purchasing quantities.

[E870] The TOFA business page advertises companywide bulk infrastructure, supporting the distinction between sales channel and delivery format; its facility count is not a TOFA sales weight.

[E872] The TOFA offering establishes Univar's relevant distribution role; the separate AI disclosure does not itself establish deployment within this product relationship. ([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E873] The TOFA offering provides an evidenced distributor-service model. A particular entrant's mandate and a particular order's obligations remain separate prerequisites. ([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E874] The offering documents a distribution-and-service participation model separate from refinery ownership. ([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E875] Univar advertises SYLFAT distribution and bulk, packaging and delivery infrastructure; its exclusivity statement does not specify worldwide territorial coverage. ([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E876] Univar advertises SYLFAT distribution and fulfillment infrastructure; this establishes a channel proposition rather than independent refinery origin.

([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E877] Univar advertises SYLFAT distribution and regional delivery services. Its exclusivity statement does not define worldwide territorial rights.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E878] Univar advertises SYLFAT distribution with bulk, packaging and regional delivery infrastructure; the page does not establish a particular order's obligations.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E879] Univar advertises SYLFAT distribution, TOFA Performance Blends, bulk and packaging infrastructure and regional fleet services. Its exclusivity wording does not define worldwide territory or order-specific fulfillment obligations; the profile's route comparison is conditional commercial analysis.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E880] Univar advertises SYLFAT distribution, bulk and packaging infrastructure, and regional fleet services. Its published exclusivity statement does not define worldwide territorial rights.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E881] Univar advertises SYLFAT distribution, packaging infrastructure and regional fleet services. Its exclusivity wording does not define worldwide authority or order-specific commitments.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E882] Univar advertises SYLFAT distribution, packaging infrastructure and regional fleet services; the page does not establish worldwide territorial authority.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

[E883] Univar advertises packaging infrastructure for its TOFA business; using that service to address a direct-offer gap remains conditional on contractual coverage.
([univarsolutions.com](https://www.univarsolutions.com/product-categories/oleochemicals/fatty-alcohols/tall-oil-fatty-acid))

Tall Oils Supplier & Distributor | Univar Solutions

[E884] The catalog establishes a public TOFA supplier and distributor role.

[E885] Univar's official tall-oils catalog lists multiple TOFA products, including CA-series offerings and Kraton SYLFAT FA2.

Pamolyn® Specialty Products Distributor | Univar Solutions

[E886] Advertises distribution of Synthomer PAMOLYN products, including tall-oil-derived oleic and linoleic fatty acids.

[E887] Univar publicly identifies Synthomer as the supplier of its advertised PAMOLYN specialty fatty-acid family.

Residue from the forest industry - UPM Biofuels

[E888] UPM describes crude tall oil, including material from its own pulp mills, as an input to its Finnish biofuel business. The implications for another buyer's allocation are conditional.
([upmbiofuels.com](https://www.upmbiofuels.com/sustainability/climate-positivity/forest-industry-residue/))

[E889] UPM documents an actual fuel outlet for crude tall oil. The implications for another chemical buyer depend on sourcing overlap and allocation commitments.
([upmbiofuels.com](https://www.upmbiofuels.com/sustainability/climate-positivity/forest-industry-residue/))

[E890] UPM identifies crude tall oil as its Lappeenranta biofuel business's main raw material and describes pulp-linked sourcing, including its own mills. This establishes an outlet, not inevitable scarcity.
([upmbiofuels.com](https://www.upmbiofuels.com/sustainability/climate-positivity/forest-industry-residue/))

[E891] UPM identifies crude tall oil as its Lappeenranta biofuel business's main raw material and describes sourcing from its own pulp mills. This supports competing-outlet and integration analysis, not uniform scarcity.
([upmbiofuels.com](https://www.upmbiofuels.com/sustainability/climate-positivity/forest-industry-residue/))

[E892] UPM identifies crude tall oil as the main raw material for its Lappeenranta biofuel business and describes sourcing from its own pulp mills.
([upmbiofuels.com](https://www.upmbiofuels.com/sustainability/climate-positivity/forest-industry-residue/))

Harmonized Tariff Schedule of the United States, 1992, Chapter 15

[E893] H0 xx.xx identifies TOFA, including both rosin-band categories; classification premise only.

[E894] H0 TOFA classification premise for the common allocation model.

Class Definition for Class 530 - CHEMISTRY: NATURAL RESINS OR DERIVATIVES; PEPTIDES OR PROTEINS; LIGNINS OR REACTION PRODUCTS THEREOF

[E895] The definition accommodates rosin acids up to xx.xx% within TOFA, supporting a higher-rosin peer inside the parent boundary rather than automatic inclusion of adjacent tall-oil fractions.
([uspto.gov](https://www.uspto.gov/web/patents/classification/uspc530/defs530.htm))

[E896] The official classification definition describes TOFA as containing free fatty acids at xx.xx% or greater while retaining measurable rosin acids. This corroborates the material-identity anchor independently of supplier naming.
([uspto.gov](https://www.uspto.gov/web/patents/classification/uspc530/defs530.htm))

TOFA - Tall Oil Fatty Acid - The White Sea and Baltic Company Ltd

[E897] The page advertises UK stock and provides a West Yorkshire business address; its commercial wording references 2025.

[E899] White Sea and Baltic identifies itself as an official distributor of Forchem FOR2 TOFA.

[E900] White Sea and Baltic's business page identifies Forchem FOR2 as the TOFA product it distributes in the United Kingdom.

TOFA - The White Sea and Baltic Company Ltd

[E898] White Sea and Baltic identifies a Forchem FOR2 distribution relationship and advertises UK packaged stock.
([whitesea.co.uk](https://www.whitesea.co.uk/tofa-tall-oil-fatty-acid/))

1997 Economic Census - Numerical List of Manufactured and Mineral Products

[E901] Code xx.xx combines rosin below xx.xx% with fatty acids above xx.xx%; extending this peer to eligible xx.xx-xx.xx% material is analytical, not established by that code.
([www2.census.gov](https://www2.census.gov/library/publications/economic-census/1997/manufacturing-reports/reference-series/m31r-nl.pdf))

[E902] Code xx.xx separately identifies TOFA containing at least xx.xx% rosin acids, supporting placement of the exact cutoff in the higher band.
([www2.census.gov](https://www2.census.gov/library/publications/economic-census/1997/manufacturing-reports/reference-series/m31r-nl.pdf))

[E903] Product code xx.xx specifies TOFA with rosin below xx.xx% and fatty acids above xx.xx%. It supports the lower-rosin category but not the analytical extension to xx.xx-xx.xx% free-fatty-acid material.
([www2.census.gov](https://www2.census.gov/library/publications/economic-census/1997/manufacturing-reports/reference-series/m31r-nl.pdf))

[E904] Product code xx.xx specifies TOFA containing at least xx.xx% rosin acids, independently recognizing the higher-rosin commercial band.
([www2.census.gov](https://www2.census.gov/library/publications/economic-census/1997/manufacturing-reports/reference-series/m31r-nl.pdf))

[E905] The 1997 Economic Census product list separates TOFA produced for sale into two rosin-related product codes. This establishes a historical commercial classification anchor, not a current global sales allocation.
([www2.census.gov](https://www2.census.gov/library/publications/economic-census/1997/manufacturing-reports/reference-series/m31r-nl.pdf))

[E906] The 1997 U.S. product classification distinguishes two TOFA rosin bands. It is a historical classification anchor, not a current Global allocation.
([www2.census.gov](https://www2.census.gov/library/publications/economic-census/1997/manufacturing-reports/reference-series/m31r-nl.pdf))

2011 M311N - Animal and Vegetable Fats and Oils: Definitions and Special Instructions

[E907] Paints and varnishes, and inks, are separately recognized end-use destinations.
([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E908] Reference List B identifies resins and plastics, including alkyd resins and plasticizers, as a distinct destination. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E909] Rubber and rubber products appear among specified industrial end uses; the list is broader than TOFA alone. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E910] Soap, synthetic detergents and toilet preparations appear in the end-use instructions. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E911] The 2011 M311N definitions distinguish TOFA at a free-fatty-acid content of xx.xx% or greater, excluding rosin acids from that calculation, from refined or distilled tall oil below xx.xx%. Rosin is separately excluded. This supports the frozen parent identity boundary, not a universal current regulation. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E912] The 2011 instructions distinguish TOFA containing at least xx.xx% free fatty acids, excluding rosin acids, from lower-content refined or distilled tall oil. This supports the frozen identity convention, not a universal current legal definition. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E913] The 2011 questionnaire instructs refined or distilled tall-oil consumers to report consumption by end use and separately defines TOFA. It is a historical U.S. classification anchor, not current global demand evidence. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E914] The destination list explicitly separates resins and plastics, including alkyd resins, from finished coating and ink destinations. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E915] The lubricant destination expressly includes greases, metal treatment and cutting oils. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E916] The lubricant destination includes grease, metal treatment and cutting oils, supporting their combined working application boundary. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

[E917] The questionnaire allocates tall-oil consumption by end use; its general fats-and-oils destination list is not proof that every listed use is a TOFA market. ([www2.census.gov](https://www2.census.gov/programs-surveys/cir/technical-documentation/questionnaires/monthly/m311n.pdf))

ZEMUR - Commercial Product Divisions

[E918] ZEMUR's commercial product divisions include tall-oil fatty acid in the lubricant-related offering. (zemur.com.mx)

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