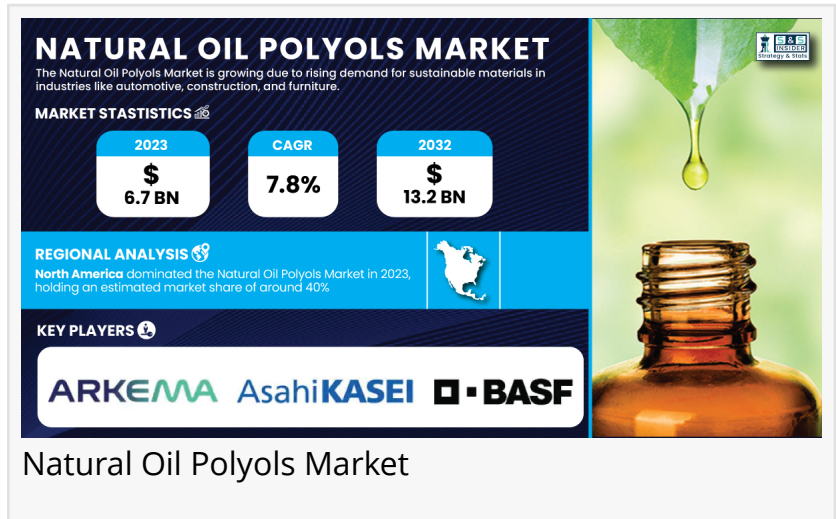


# Natural Oil Polyols Market Size to Worth USD 13.2 Billion by 2032, at a CAGR of 7.8% | SNS Insider

*The Natural Oil Polyols Market is driven by rising demand for eco-friendly materials in various industries and the need for lightweight, durable products.*

AUSTIN, TX, UNITED STATES, January 27, 2025 /EINPresswire.com/ -- The [Natural Oil Polyols Market](#) Size was valued at USD 6.7 billion in 2023 and is expected to reach USD 13.2 billion by 2032 and grow at a CAGR of 7.8% over the forecast period 2024-2032.



## Natural Oil Polyols Market Thrives Amid Growing Demand for Sustainable Materials in Automotive, Construction, and Furniture Sectors, Driving Innovation

The Natural Oil Polyols Market is experiencing robust growth due to the rising demand for sustainable materials across industries such as automotive, construction, and furniture. Derived from vegetable oils, natural oil polyols offer an eco-friendly alternative to petroleum-based polyols, reducing carbon emissions and dependence on fossil fuels. Leading players like Chimcomplex and Manali Petrochemicals are investing in innovative technologies, including green polyol production and carbon capture techniques, to enhance sustainability and meet regulatory demands. Market expansion is driven by the adoption of bio-based polyurethane foams in the automotive and construction sectors, where lightweight and durable materials are prioritized to improve fuel efficiency and reduce emissions. Additionally, the volatile prices of conventional polyols and increasing environmental concerns have encouraged manufacturers like Cargill Incorporated and BASF SE to shift toward bio-based alternatives. While the market faces challenges from substitutes like animal oil polyols, the growing adoption of natural oil polyols in applications such as flexible foams, automotive interiors, and construction materials is expected to sustain its momentum.

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## Key Players:

- Arkema S.A. (Rilsan PA11, Rilsamid PA12)
- Asahi Kasei Corporation (Leona PA66, Tenac PA12)
- BASF SE (Ultramid PA6, Ultramid Cycled PA66)
- Cathay Biotech Inc. (Teryl PA56, Teryl PA510)
- Domo Chemicals (Technyl PA6, Technyl Star PA66)
- DuPont de Nemours, Inc. (Zytel PA66, Hytrel PA12)
- EMS-Chemie Holding AG (Grilamid PA12, Grilon PA6)
- Evonik Industries AG (Vestamid PA12, Vestamid Terra PA610)
- Grupa Azoty S.A. (Tarnamid PA6, Tarnamid PA66)
- Honeywell International Inc. (Aegis PA6, Capron PA66)
- Invista (Torzen PA66, Cordura PA6)
- LANXESS AG (Durethan PA6, Durethan ECO PA66)
- Li Peng Enterprise Co., Ltd. (Zig Sheng PA6, Zig Sheng PA66)
- Mitsubishi Chemical Corporation (Durabio PA6, Diamiron PA66)
- Radici Group (Radilon PA6, Radilon A PA66)
- Royal DSM N.V. (EcoPaXX PA410, Arnitel PA12)
- Sabic (Ultramid PA6, Ultem PA12)
- Solvay S.A. (Bio Amni PA610, Technyl eXten PA610)
- Toray Industries, Inc. (Amilan PA66, Toraycon PA6)
- Ube Industries, Ltd. (UBESTA PA12, UBESTA XPA PA6)

## Market Segmentation and Sub-Segmentation Included are:

### By Product Type

- Soy Oil
- Castor Oil
- Palm Oil
- Canola Oil
- Sunflower Oil
- Others

### Soy Oil Leads as a Cost-Effective and Versatile Feedstock in Natural Oil Polyols Market

In 2023, the soy oil segment held 35% of the Natural Oil Polyols Market due to its affordability, availability, and eco-friendly properties. Its versatility supports applications like flexible and durable foams in furniture, automotive interiors, and construction materials, meeting the growing demand for sustainable solutions.

### By Application

- Polyurethane (PU) Foam

- Coatings & Adhesives
- Sealants
- Elastomers
- Lubricants
- Others

### Polyurethane Foams Dominate with Broad Adoption Across Sectors

Polyurethane foams accounted for 40% of the market share in 2023, driven by their durability, flexibility, and eco-benefits. Widely used in automotive interiors, furniture, and bedding, PU foams derived from natural oil polyols align with sustainability goals, gaining traction across industries.

### By End-User Industry

- Automotive
- Construction
- Furniture & Bedding
- Packaging
- Electronics
- Personal Care
- Others

### Automotive Sector Drives Demand for Natural Oil Polyols

With a 30% market share in 2023, the automotive sector leads the adoption of natural oil polyols, leveraging bio-based polyurethane foams for lightweight, sustainable, and fuel-efficient vehicle interiors, meeting stringent environmental standards and consumer preferences.

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### North America Dominated the Natural Oil Polyols Market Driven by Demand for Sustainable Solutions

North America dominated and held a 40% market share in 2023, led by strong manufacturing, regulatory support, and growing demand for sustainable products. The U.S. is a key player, with major companies like BASF and Dow Inc. shifting towards bio-based polyols, while the automotive and construction industries integrate these materials for greener solutions. Canada also contributes significantly to its canola oil production.

### Asia-Pacific Emerges as the Fastest-Growing Region for Natural Oil Polyols

Asia-Pacific emerged as the fastest growing region at a 7% CAGR in 2023, driven by rapid

industrialization, government green initiatives, and growing consumer demand in China and India. The automotive and construction sectors in these countries are increasingly adopting bio-based polyols, supported by local manufacturing expansions and government incentives, fueling strong market growth.

## Recent Developments

- May 2024: Chimcomplex SA Borzesti completed a €40 million expansion of its green polyol production facility in Romania, adding 17,000 tons of annual capacity. The upgraded plant utilizes eco-friendly raw materials like castor and soybean oils and targets a CO2 emission reduction of 3,400 tons. Co-financed by Innovation Norway, the project underscores the company's dedication to sustainability.
- June 2023: Stepan Company introduced a new line of bio-based polyols derived from renewable resources, such as soy and castor oils. This range caters to applications including polyurethane foams, coatings, and adhesives, supporting the shift towards sustainable materials.
- May 2023: BASF SE expanded its production capacity for bio-based polyols to address the rising demand in automotive, construction, and electronics industries, reinforcing its focus on eco-friendly solutions.

The Natural Oil Polyols Market is expanding due to rising demand for sustainable materials in industries like automotive and construction. Derived from renewable sources such as soy and castor oils, these eco-friendly polyols reduce emissions and fossil fuel use. North America leads, while Asia-Pacific grows rapidly, driven by industrialization and green adoption. Key players like BASF invest in innovations to meet the rising demand for bio-based polyols in applications like foams and coatings.

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