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Argus Fatty Alcohols

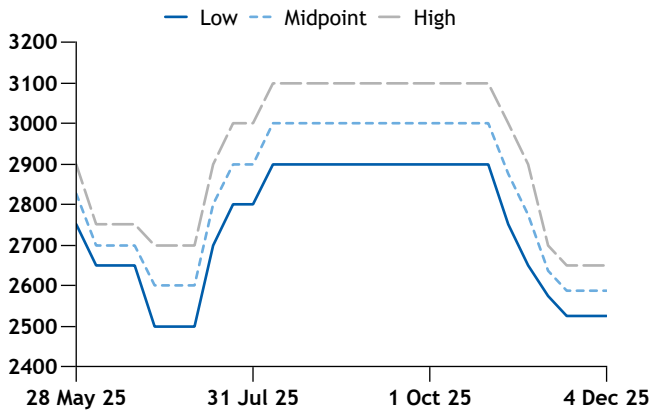
Issue 25-49 | Thursday 4 December 2025

OUTLOOK

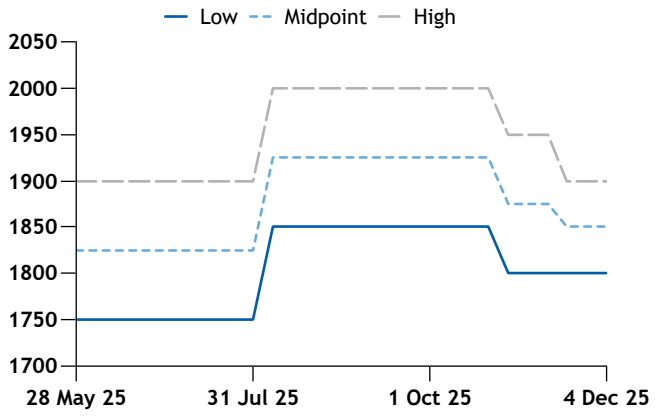
- EUDR delay approved by Parliament
- Floods in key palm producing regions
- European palm oil imports continue to decline

HISTORICAL PRICING

C12-14 southeast Asia historical spot pricing $/t



C16-18 southeast Asia historical spot pricing $/t



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PRICES

Southeast Asia spot averages $/t

	23 Oct	6 Nov	20 Nov	4 Dec	Average
C8 fob	2,825	2,725	2,725	2,725	2,750
C10 fob	2,675	2,625	2,625	2,625	2,638
C12-14 fob	3,000	2,775	2,588	2,587.5	2,738
C16-18 fob	1,925	1,875	1,850	1,850	1,875
C16 fob	2,020	1,950	1,900	1,900	1,943
C18 fob	1,950	1,900	1,825	1,825	1,875

Southeast Asia spot price range

	Δ	$/t		Δ	¢/lb	
C8 fob	◄►	2,600	2,850	◄►	117.93	129.27
C10 fob	◄►	2,500	2,750	◄►	113.40	124.74
C12-14 fob	◄►	2,525	2,650	◄►	114.53	120.20
C16-18 fob	◄►	1,800	1,900	◄►	81.65	86.18
C16 fob	◄►	1,850	1,950	◄►	83.91	88.45
C18 fob	◄►	1,750	1,900	◄►	79.38	86.18

Prices are assessed on a weekly basis

US 4Q25 contract price range

	Δ	¢/lb		Δ	$/t	
C12-14; C12-16; C12-15 Mid-cut						
Del bulk	▲+6.00	160.00	175.00	▲+17.00	3,527	3,858
C16-18 30:70 blend						
Del bulk	▲+2.00	128.00	140.00	▲+2.00	2,822	3,086
C16-18 50:50 blend						
Del bulk	▲+2.00	131.00	143.00	▲+2.00	2,888	3,153
C18 straight cut						
Del bulk	▲+8.00	125.00	132.00	▲+4.00	2,756	2,910
C16 straight cut						
Del bulk	▲+7.00	138.00	148.00	▲+8.00	3,042	3,263

Mexico spot price range

	Δ	$/t		Δ	¢/lb	
C12-14 Mid cut						
cif Veracruz	◄►	3,400	3,600	◄►	154.22	163.29

China spot prices $/t

	31 Oct	7 Nov	14 Nov	21 Nov	28 Nov
C12-14 ex-works	3,248	3,145	3,043	2,912	2,798
C16-18 ex-works	2,053	2,036	2,015	1,997	2,007

Northwest Europe spot prices €/t

	Δ	Prices		Δ
C12-14	◄►	2,650	2,750	◄►
C16-18	◄►	1,850	2,000	◄►

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NORTH AMERICA

Mass balance premium

Mass balance premium for volume sold with certification is heard at 6.0-8.0 ¢/lb.

Truck freight from USGC to Midwest generally ranges 8.0-10.0 ¢/lb.

Truck freight from USGC to east coast generally ranges 8.0-12.0 ¢/lb.

There has been limited activity in the region with participants away for the Thanksgiving holiday. With uncertainty in the market also continuing to dampen buying interest, participants do not expect there to be a pickup in activity until the new year at the earliest.

In the lauric oils market, with coconut oil (CNO) prices having softened further, buyers remain hopeful this will lead to a further reduction in fatty alcohols values in the US. Furthermore, sources note that a reduction in tariffs for Malaysian imports is also likely to lead to softer prices going forwards.

With the implementation of the EU Deforestation Regulation (EUDR) now increasingly likely to be delayed, the additional demand for CNO seen previously from the oleochemicals sector is now expected to subside.

For the time being, palm kernel oil (PKO) remains the cheaper alternative, and sources note that US buyers and producers continue to favour PKO-based alcohols over the CNO-based alternative as a result. But market participants are closely monitoring flooding in Indonesia, particularly in Sumatra, one of the country's key palm oil producing regions, as any disruption could significantly affect future yields from the region.

According to latest media reports, Indonesia is reportedly reluctant to agree to a trade deal with the US. The resistance from the southeast Asian country emerged during negotiations to finalise a preliminary trade deal. Indonesia rejected the clauses, stating they placed undue restrictions on the nation's freedom to act, the report added. Malaysia and Cambodia agreed to similar deals with the US a few weeks earlier.

The US and Indonesia were reportedly close to finalising a trade deal. The agreement would allow certain Indonesian commodities not produced in the US such as crude palm oil, tea, and coffee, to enter the US market tariff-free, while Indonesia would import US energy products, according to Indonesian media reports.

In industry news, Stepan announced the sale of its subsidiary, Stepan Philippines Quaternaries (SPQI) manufacturing assets located in Batangas, the Philippines, to Masurf, a subsidiary of Musim Mas. As part of the deal, SPQI has entered into a tolling agreement with Masurf for the continued service of SPQI customers in southeast Asia. Details of the transaction were not disclosed.

Change to December publishing schedule

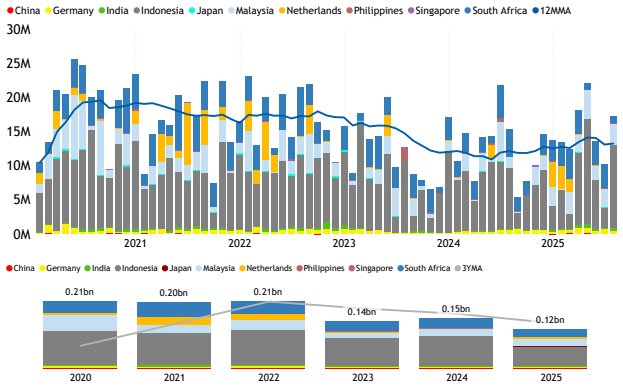
Following consultation, *Argus* will not publish the Fatty Acids, Fatty Alcohols, and Glycerine bulletin reports on 24 December, and will publish the bulletin reports instead on 31 December because of the holidays.

US rail costs are currently discussed at about 4-6¢/lb, depending on destination, with truck costs at about a 6-8¢/lb premium over rail.

The mass balance (MB) premium range is approximately 6-8¢/lb as the common spread. The range is flexible depending upon market input and subject to change going forward at such time as change is evident.

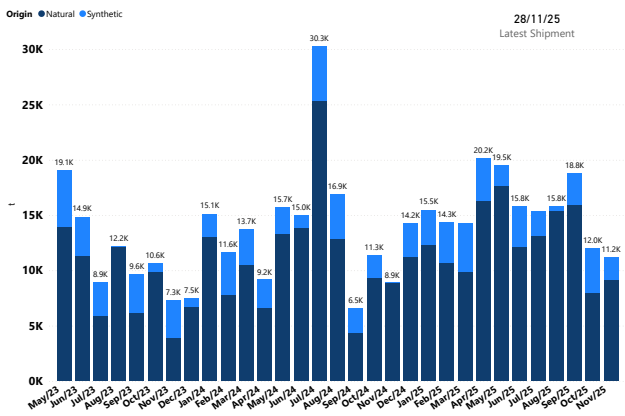
The import graph shows August imports have picked up from the previous month, with the vast majority shipped from Indonesia, according to Global Trade Tracker.

US fatty alcohol import volume by country of origin *t*



According to Argus Trade Monitor, which tracks bill of lading data, around 11,200t of mostly natural fatty alcohols has been imported up to 28 November.

US natural and synthetic fatty alcohol imports *t*



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NORTH AMERICA (CONTINUED)

Mont Belvieu Ethane & Ethylene

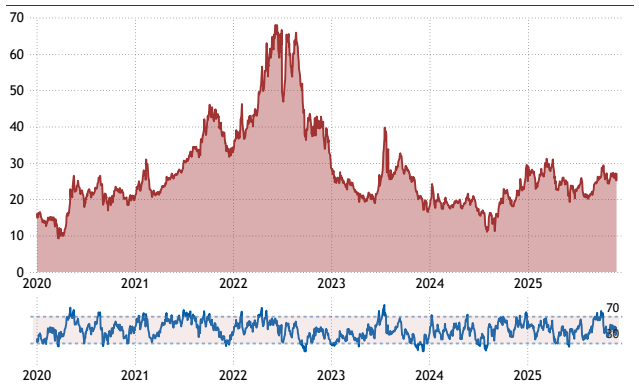
The US ethylene contract for November fell by 1¢/lb to 30¢/lb, its lowest settlement since May 2024, as spot prices dropped, and ethane cash costs were little changed.

The US ethylene contract is a 50/50 formula based on ethylene spot prices and ethane cash costs.

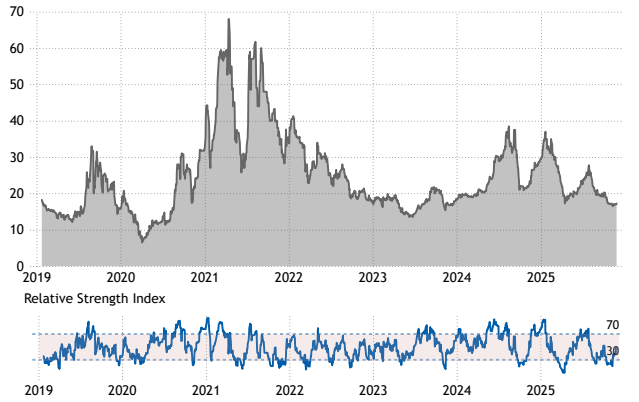
US spot ethylene prices at the Enterprise Products Partners (EPC) hub at Mont Belvieu, Texas, fell to multi-year lows in November. *Argus*' 30-day volume weighted average (VWA) at market close on 2 December stood at 16.86¢/lb, the lowest since the end of July 2023 and a decline of 2.5¢/lb from October's VWA of 19.39¢/lb.

Falling ethylene prices reflect record US production and swollen stocks. The US produced 23.2bn lb of ethylene in the third quarter, the largest quarterly production ever, according to American Fuel & Petrochemical Manufacturers data. This helped push ethylene inventories to 2.98bn lb, the highest level in more than six years.

ICE Mont Belvieu ethane pricing ¢/USG

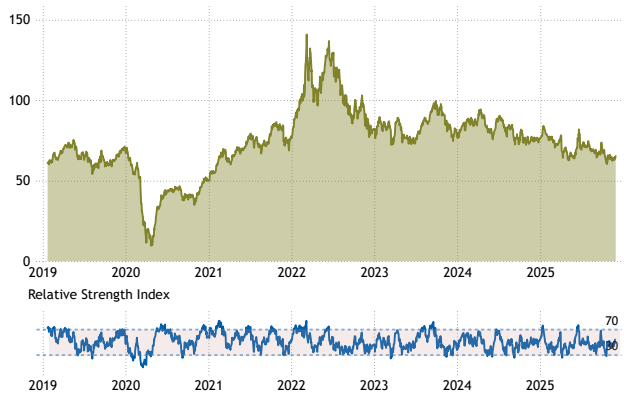


Ethylene pipeline choctaw pricing ¢/lb



Upstream oil and gas

Brent crude oil futures $/bl



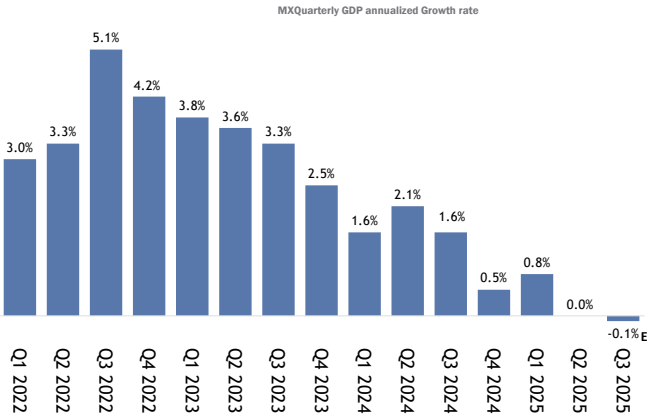
Mexico

Mexican mid-cut fatty alcohol values are holding stable, in line with levels seen in the US.

In economic news, Mexico's economy grew by a revised 0.6pc in Q2 from the previous quarter, slightly below the earlier estimate of 0.7pc, the latest data shows.

Growth was broad-based, with construction, finance, manufacturing and retail all contributing. Retail, in particular, likely got a boost from healthy tourism, rising real wages and low unemployment. But the pace of GDP growth looks set to cool in Q3, with lean government spending, weak remittances, US tariffs on certain exports, and uncertainty around US trade policy all expected to weigh on activity.

Mexico quarterly GDP growth ±%YoY



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ASIA

Participants continue to track developments across the global market, and with buying interest remaining at low levels, fatty alcohols values have been holding stable. With CNO softening further, some buyers have further delayed their purchases in the hope that fatty alcohols prices will continue to decline.

Many also expect the downwards pressure to be felt on mid-cuts due to increased spot availability from new plant startups in Indonesia, with more capacity also expected soon. But many are now closely monitoring flooding in Indonesia, as any disruption could significantly affect future palm yields from the region.

Parts of Aceh, North Sumatra and West Sumatra in the west of the country have been affected by severe flooding. These regions account for just 11pc of Indonesia's palm oil production, according to the US Department of Agriculture.

But the rains and subsequent flooding have cut off roads in many of the affected areas, according to the country's national disaster mitigation agency, and access to some of the worst-flooded areas had not been restored as of 1 December, the agency added.

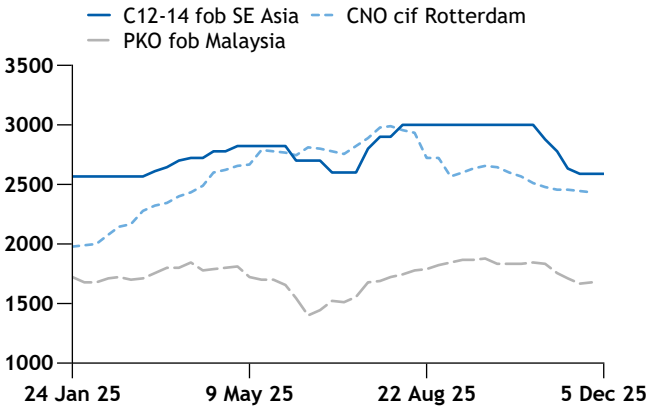
Production and inventories in other parts of Indonesia will be able to offset the impact of short-term logistics disruptions in the affected areas, some market participants noted.

In industry news, South Korean steel giant Posco International has acquired a majority share in Indonesian palm oil producer Sampoerna Agro, and has inaugurated a palm oil refinery, allowing the firm to ensure a stable supply of edible oil and biodiesel feedstock.

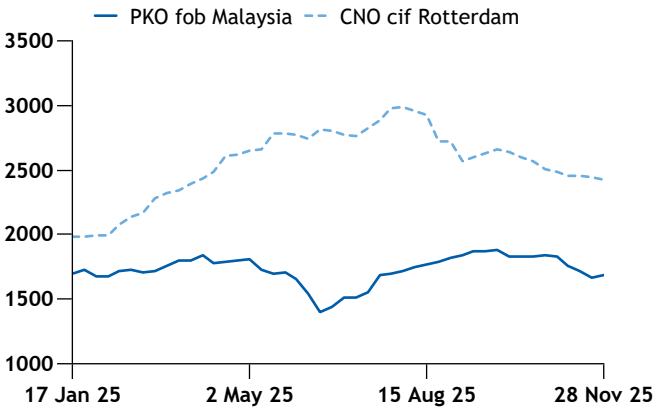
Posco has added 128,000 hectares of palm plantations through the acquisition deal. Posco disclosed it now owns a total 150,000ha of farmland in Indonesia in addition to its existing palm plantations in Papua, Indonesia. The plantation acquisition is intended to reduce South Korea's reliance on edible oil imports with stable palm oil supply from Indonesia, Posco said.

Posco has also completed the AGPA Refinery Complex (ARC), a palm oil refinery in East Kalimantan with a 500,000 t/yr capacity — equivalent to about 80pc of South Korea's annual imports of refined palm oil — in partnership with South Korean energy and chemical company GS Caltex. Crude palm oil produced from the acquired palm plantations will be supplied to ARC to be processed into refined palm oil, and will be sold both domestically and exported to South Korea, China and other countries, according to Posco. GS Caltex aims to support the South Korean biofuels industry by supplying refined palm oil from the refinery as a biodiesel feedstock.

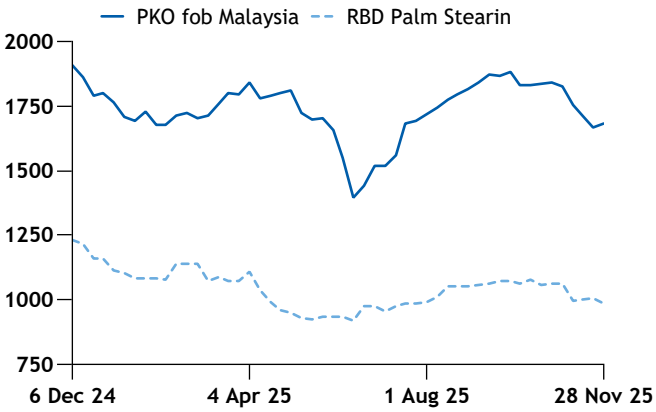
CNO & PKO vs C12:14 $/t



CNO vs PKO, weekly average $/t



RBD palm stearin vs PKO, weekly average $/t



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ASIA (CONTINUED)

Weather in key production regions

In Indonesia, the Badan Nasional Penanggulangan Bencana reported flooding in Sumatra, one of the biggest palm oil producing provinces in the country. The National Disaster Risk Reduction and Management Council of the Philippines also reported flooding and landslides in various regions of the country.

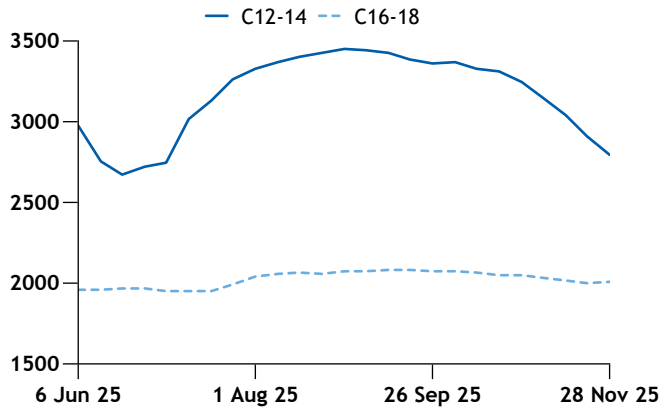
Latest assessments of the El Niño-Southern Oscillation (ENSO) indicate La Niña is underway, according to the Australian Bureau of Meteorology (BoM). The Bureau's model currently predicts that tropical Pacific Ocean temperatures are likely to remain at La Niña levels until early 2026 before returning to neutral. This timing aligns with most international models assessed. Observations in the tropical Pacific Ocean have been consistent with La Niña conditions since early October, the BoM said.

China

Mid-cut fatty alcohols values have declined in China, with softening feedstock prices as well as slack demand from downstream industries continuing to pressure the market.

In the C12-14 mid-cut tier, prices declined to 19,800 yuan per metric ton (Yn/t) exw northeast China. But in early December, a slight rebound to PKO prices started to support the C12-C14 market, and some suppliers were heard quoting higher.

China select fatty alcohols, weekly average prices $/t



C16-18 fatty alcohols have been holding stable at Yn14,200/t exw northeast China, with producers maintaining their offers at current levels.

The Chinese EO market softened on sluggish demand and ample domestic supply. Ex-tank prices in east China fell to Yn5,800-6,000/t, down by Yn200/t. Weak feedstock ethylene prices also weighed on the market sentiment.

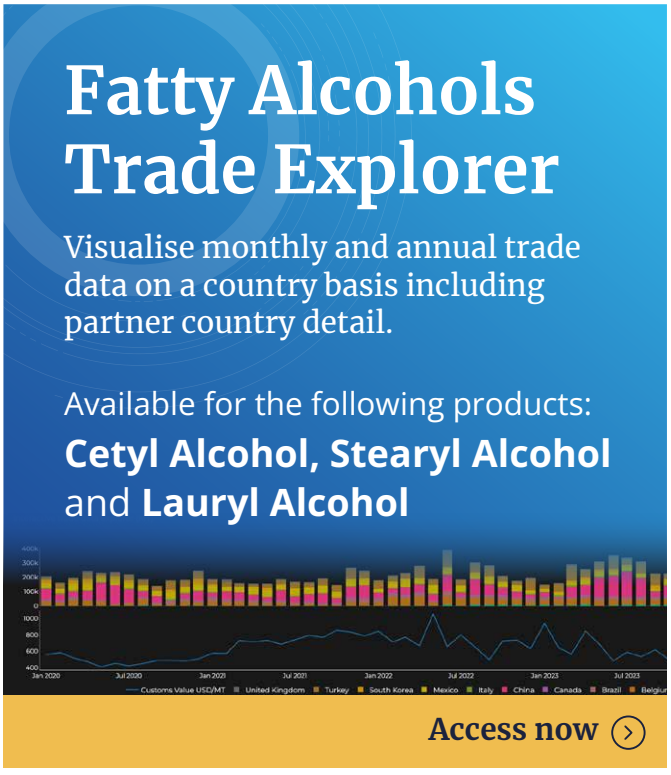
Average EO operating rates in China held at 68pc. Sinochem Quanzhou remained offline for a two-month long planned maintenance. Ningbo Fund and Sinopec Maoming also planned maintenance at their respective EO units in early December.

India

Palm oil arrivals to India — crude and refined products — fell to 7.58mn t in 2024-25 from 9.02mn t in the previous season, driven mainly by lower arrivals of refined palm oil. Importers have been deterred from buying refined products because of their higher import duty compared with crude palm oil since May. India raised its import duty on palm olein to 19.25pc in May from 8.25pc previously.

Indonesia was the largest exporter of palm oil to India in 2024-25, supplying 3.59mn t, down from 4.83mn t the previous season. Malaysia also reduced its palm oil shipments to India, to 2.8mn t from 3.25mn t in 2023-24.

India imported 16.3mn t of vegetable oils in the 2024-25 marketing year ending in October, up by 1pc from 16.2mn t a year earlier.



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EUROPE

Spot fatty alcohols values are holding steady in the region, buyers remain hesitant to purchase further volumes in light of the ever-changing EUDR news.

Furthermore, with demand remaining at low levels for some time, suppliers note that they will likely be able to meet demand for the beginning of next year from their existing stocks.

On 26 November, the European Parliament approved a one-year delay of the bloc's deforestation law, allowing for a final agreement on the postponement in the coming weeks.

The delay still needs to be procedurally agreed and published before the end of the year. That will now prevent EUDR due diligence requirements entering into force on 31 December for commodities such as palm oil and derivatives.

The parliament voted for a position similar to that of EU states, granting firms an additional year to comply with EUDR rules. When published in the bloc's official journal, large operators and traders will have to comply from 30 December 2026 followed by small and micro firms from 30 June 2027. Parliament also called for a "simplification" review by 30 April 2026 to assess the EUDR's impact and administrative burden.

Parliament is ready for discussions with EU states, which earlier in November agreed a similar position, paving the way for speedy negotiations on a final text. Agreement must be reached before parliament's final plenary meeting on 15-18 December to avoid the EUDR taking effect at the end of this year.

Parliament's large majority, with 402 for and 250 against, indicates significant backing for the one-year delay. But the Greens accused parliament's largest centre-right EPP group of working with far right parties to "unravel" the EUDR. The Greens asked the commission to withdraw its initial October proposal for a one-year delay for small operators and six-month grace period for medium and large operators.

"The review clause will open another occasion for further destruction in just a few months' time. Instead of finding a straightforward technical solution to their IT issue, the EU commission has taken an unnecessary risk," said Austrian Green Thomas Waitz, a member of parliament's agriculture committee.

"Our position is based on the compromise that was supported by 24 member states," said German EPP member Christine Schneider, who will lead negotiations for parliament with EU states for a final legal text. "We also insisted on relief measures for micro and small producers in low-risk countries to ensure proportionate application for farmers and foresters," said Schneider.

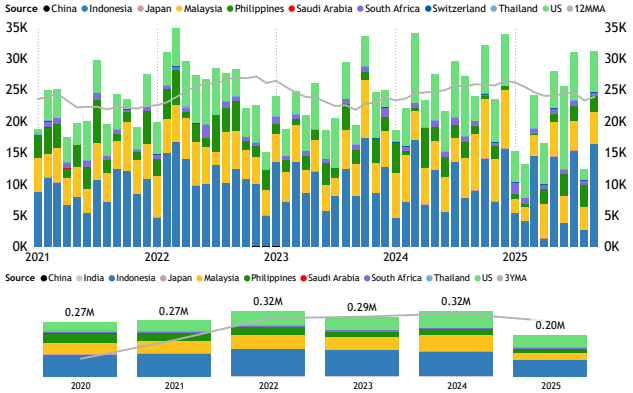
Meanwhile, the EU imported less vegetable oils so far this marketing year — from July to mid-November — than the same periods in the past 12 years, according to the European Commission's preliminary data because of ongoing reduction of palm oil consumption both in the food and biofuel sectors.

EU's cumulative vegetable oil imports on 1 July-16 November fell by 189,700t on the year to 2.12mn t — the slowest imports since at least 2014-15 when *Argus* began collecting data. The slow import stemmed mainly from fewer palm oil receipts.

Palm oil imports from July to mid-November totalled 1.08mn t, down by 239,400t on the year, and the lowest level for the last 12 years. The bloc's annual palm oil imports have been gradually decreasing since the 2019-2020 marketing year because the EU restricted palm oil use in biofuel production under the Renewable Energy Directive and tightened sustainability certification. Palm oil imports are unlikely to recover this season, despite the delay in EUDR by another year.

The following graph data shows import statistics for the EU at Rotterdam. September saw the highest imported volumes of the year, with the majority coming from Indonesia.

EU Fatty alcohols imports from outside Europe *t*



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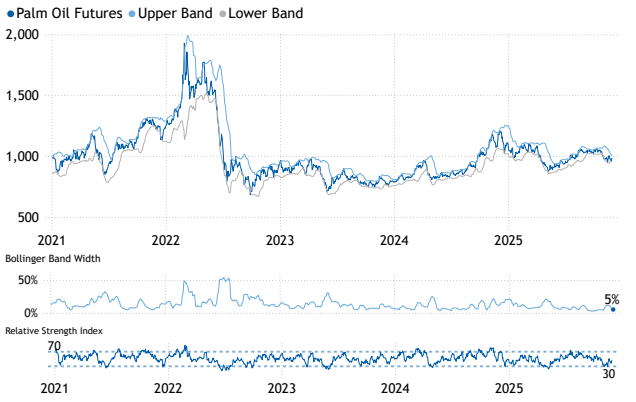
TROPICAL OILS

Tropical and key edible oils weekly pricing				$/t
	3 Jan 25	21 Nov 25	28 Nov 25	Weekly trend
Fats and greases				
Crude palm oil fob Malaysia	1,073	994.64	973.53	▼
Crude palm kernel oil fob Malaysia	1,763	1,668	1,683	▲
Coconut oil cif Rotterdam	1,980	2,446	2,428	▼
RBD palm olein fob Malaysia	1,125	1,033	1,014	▼
Palm fatty acid distillate fob Malaysia	970	1,008	970	▼
RBD palm stearin fob Malaysia	1,115	1,008	985	▼
Rapeseed oil fob Dutch mill	1,114	1,261	1,261	◄►
Soybean oil futures CBOT	872	1,130	1,105	▼
Bleached fancy tallow del Chicago	956	1,080	1,124	▲
Fats and greases				
Used cooking oil cif ARA	1,060	1,139	1,122	▼
Used cooking oil fob China bulk	978	1,096	1,090	▼

** the previous week is displayed when no trades occur*

Tropical and key edible oils daily pricing				
Ticker	Description	Exchange	Date	Price
FCPO1!	Palm oil futures ringgit/t	MYX	2 Dec	4,100.00
FCPO1!	Palm oil futures $/t	MYX	2 Dec	992.50
ZL1!	Soybean oil futures $/t	CBOT	2 Dec	1,152.14

Palm oil futures $/t



Usual interpretation and usage of the RSI are that values of 70 or above indicate that a security is becoming overbought or overvalued and may be primed for a trend reversal or corrective pullback in price. An RSI reading of 30 or below indicates an oversold or undervalued condition.

Bollinger Band Width percentage illustrates volatility in percentage terms. The higher the value, the greater the recent percentage price swings in a commodity or stock.

Palm taxation

During December 2025, Malaysia's CPO export duty will continue at the highest rate of 10pc, although the country's CPO reference price moved down for the month. The CPO reference price used to set the duty fell to 4,206.38 ringgit/t ($1,019/t) in December, down from 4,262.23 ringgit/t in November, according to the country's palm oil board.

MPOB

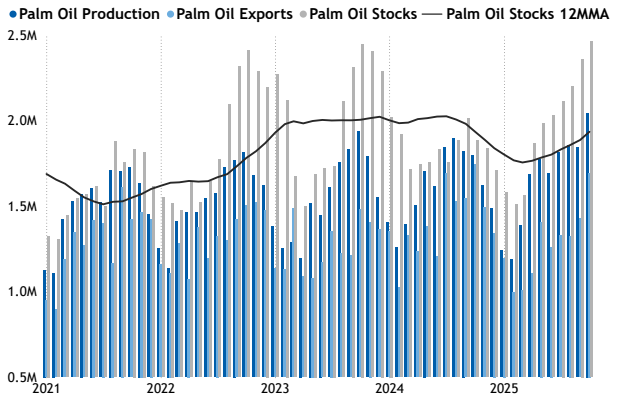
Malaysian palm oil stocks rose for an eighth straight month in October to a 6.5-year high, Malaysian palm oil board (MPOB) data show.

Palm oil stocks rose by 4pc on the month to 2.5mn t in October, according to preliminary data from MPOB. Inventories were also 31pc higher than a year earlier. CPO futures on Bursa Malaysia also fell by 3pc over October, suggesting weaker demand for palm oil.

Malaysian CPO production rose by 14pc from a year earlier to 2mn t in October, driven by higher output from east Malaysia. Supply out of Sabah and Sarawak rose by 19pc and 15pc respectively on the month to 446,000t and 481,000t, while output from peninsular Malaysia rose by 7pc to 1.1mn t over the same period.

Malaysia's palm oil exports rose by 19pc on the month to 1.7mn t in October. Oleochemical exports rose by 8pc to 254,000t from September. Biodiesel exports declined by 68pc on the month to 11,000t in October, but the total exported volume in January-October was 21pc higher at 276,000t compared with the same period in 2024.

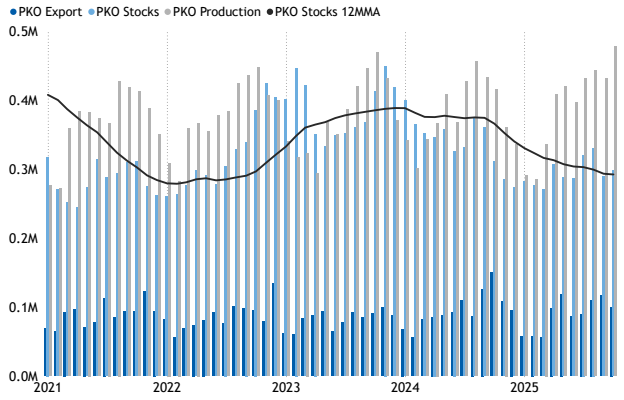
Malaysia palm oil production, exports, stocks t



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TROPICAL OILS (CONTINUED)

Malaysia palm kernel oil production, exports, stocks *t*



GAPKI

Indonesia's palm oil stocks rose in September as domestic consumption eased, data from industry group Gapki show.

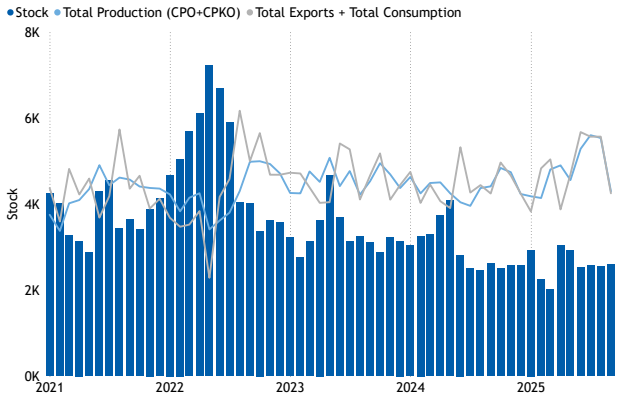
Stocks climbed by 1.9pc on the month to 2.59mn t, signalling weaker domestic demand and slower exports. Stock levels are a key indicator of supply-demand trends, and Indonesia's monthly data garners close attention as the country produces more than half of global palm oil.

Indonesian palm oil product exports fell by 36.6pc from August to 2.20mn t in September, but were down just 2.7pc from a year earlier. Oleochemical exports dropped by 53pc on the month to 93,000t, while CPO exports fell by 81.5pc to 91,000t from 494,000t in August. Total palm oil exports over January-September rose by 13.4pc to 24.9mn t compared with the same period in 2024.

Total palm oil output fell by 22.4pc on the month to 4.3mn t in September, with CPO down 22.3pc at 3.9mn t and palm kernel oil down 23.9pc at 366,000t. Over the first nine months of the year, total palm oil output increased by 11.3pc to 43.3mn t.

Domestic consumption fell by 3.2pc on the month to 2mn t in September. Biodiesel use dropped by 3.7pc to 1.07mn t, food demand eased by 1.6pc to 793,000t, while oleochemical consumption rose by 3.8pc to 190,000t. Domestic palm oil consumption during January-September climbed to 16.4mn t, a 5.1pc increase compared with the same period last year.

Indonesia palm oil production, exports, stocks *'000t*



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ECONOMIC VIEW

The US reported a growth in employment in the month of September after a slow summer. Total nonfarm payroll employment was up by 119,000 in September, the US Bureau of Labor Statistics said after a government shutdown in the country delayed the publication of key reports.

However, the unemployment rate edged up to 4.4pc in September from 4.3pc. The job growth has not changed significantly since April.

The consumer confidence index was down at 88.7 points in November from 95.5 points in the previous month, according to think tank the Conference Board.

This points to consumer confidence falling sharply in November, hitting its lowest level since April after months of stagnation. All components of the index weakened, with the present situation index reflecting reduced optimism regarding business and labour market conditions.

Expectations for business conditions, employment prospects, and household income over the next six months have all declined, with income expectations dropping significantly after a period of strong gains, according to the think tank.

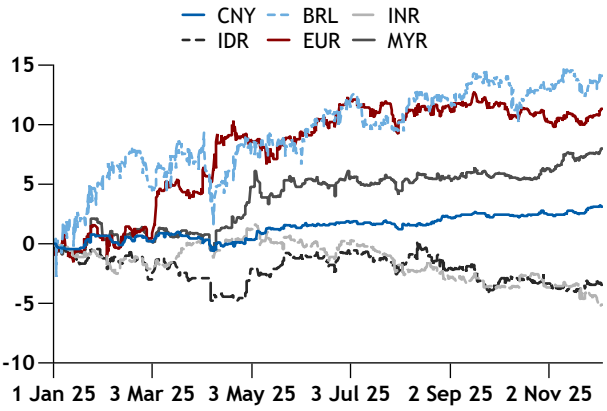
On the other side of the Atlantic, the UK's chancellor Rachel Reeves announced the country's autumn budget. The budget includes new taxes and tax freezes. The income tax threshold for employees, meaning the point at which people start paying higher tax rates, will remain unchanged till 2031. This would mean that pay hikes for employees could push earners into higher tax bracket.

The autumn budget was presented amid ongoing uncertainty over the UK's public finances and growing dissatisfaction with the governing Labour Party.

Currency

Expectations of another interest rate cut by the Federal Reserve at its next monetary policy meeting continues to weigh on the US Dollar. The US Dollar Index, which tracks the Greenback's value against a basket of six major currencies, is trading around 99.20, having earlier slipped to two-week lows.

Key oleochemical currencies' performance vs $ *±%YTD*



SHIPPING AND LOGISTICS

US container ports are set to end 2025 with volumes close to last year, despite a turbulent start and slowing imports. The port of Los Angeles handled 848,400 TEUs (Twenty-Foot Equivalent Units) in October, down 6pc year-on-year. However, volumes through the first 10 months of 2025 rose 2pc to 8.6 million TEUs, keeping the port on track for a possible 10-million milestone, according to an analyst report. A seasonal dip of up to 15pc is expected through year-end. Looking to 2026, port leaders remain cautious amid high tariffs and unresolved trade deals, delaying investment and hiring, according to the report.

Drewry's World Container Index (WCI) declined by 2pc to $1,806 per 40ft container on 27 November, largely driven by lower freight rates on Transpacific and the Asia-Europe routes.

Freight rates from Shanghai to Los Angeles fell 4pc to $2,089 per 40ft container, and spot prices for Shanghai to New York also declined 6pc to $2,735 per 40ft container.

Drewry's Container Capacity Insight indicates that blank sailings on the Transpacific route will ease, boosting available capacity. As a result, Drewry expects freight rates to soften slightly heading towards the end of the year.

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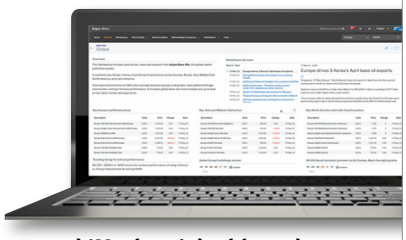


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