

## **Food Grade Lubricants Market - Global Outlook and Forecast 2022-2027**

Market Report | 2022-07-27 | 300 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global food grade lubricants market is expected to grow at a CAGR of 5.48% during 2022-2027.

Food grade lubricants are those oils used in industrial machines (such as conveyor belts, pumps, tanks, mixers, hoses and pipes, and chain drives) for the smooth functioning of the devices. It plays a vital role in protecting the devices from rust, corrosion, oxidation, breakdown, and heat. Furthermore, the food industry prevents health hazards in case of incidental or accidental contact with food.

Food grade oil is widely used in the manufacturing equipment of food & beverages, food packaging, cosmetics, pharmaceuticals, and animal feed as they are:

- Tasteless
- Odorless
- Physiologically inert
- Colorless

"In the food & beverage industry, food-safe machine lubricants are crucial. The production of food, beverages, and related products such as packaging puts the strictest requirements on lubricants used in the manufacturing process", says Giles Cutter, Lubritech Divisional Manager, FUCHS Lubricants South Africa.

Food grade lubricants are more regulated than other lubricating oils because they are highly used in the food & beverage industry and cosmetic and medicine processing plants. These products are highly prone to microbial contamination, reducing their nutritional value. If the safety standards are not met during processing, storage, and packaging, it can lead to microbial contamination. Henceforth, several regulatory bodies such as US FDA, Canadian Food Inspection Agency (CFIA), and ISO 21469 have set the regulations and standards to specify the hygiene requirement for the formulation, manufacturing, and handling of lubricants. Thus, the regulatory landscape is a significant hindrance to scaling up operations by small and medium enterprises.

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But at the same time, it is driving the market because these standards and regulations ensure the customer regarding the product's safety, quality, and hygiene.

## RECENT DEVELOPMENTS IN THE INDUSTRY

-□ In September 2021, Fuchs announced the local production of food grade lubricant product range "CASSIDA" in South Africa. This will enable the company to become a dominant player and save production costs as SADC does not apply duties on the locally produced product.

-□ In January 2022, Petro Canada Lubricants launched PURITY FG Synthetic Compressor Fluid, a new product line. NSF registers this product as an H1 lubricant. It fits entirely in HACCP (Hazard Analysis and Critical Control Point) and GMP (Good Manufacturing Practice) plans, demonstrating that the product is high quality and meets the food industry standards.

-□ In 2018, Petro Canada Lubricants became the first global supplier of food grade and non-food grade hydraulic fluid to Husky Injection Molding Systems for the "PURITY FG Synthetic Fluid 46" product.

-□ In 2021, Petro Canada Lubricants enhanced "PURITY FG2" food grade lubricant by adding MICROL MAX grease in its formulation. Micro is an antimicrobial preservative registered by the U.S. Environmental Protection Agency (EPA) in food grade lubricant products.

## MARKET TRENDS & DRIVERS

### Rising Demand for Packaged and Processed Food

The increasing urbanization, changing lifestyles, a time constraint for preparing food, expanding population, and the growing purchasing power, especially in the economies of China and India, is stimulating the demand for processed and packaged food worldwide. According to the study conducted by the Associated Chambers of Commerce and Industry of India (ASSOCHAM), India, and Grant Thornton, UK, by 2024, India's food processing sector is likely to attract USD 33 billion investment as the total food production in India is estimated to be double by 2024. This growth is creating a demand for food-grade oils. The food grade oils are primarily used in the food processing machines to reduce the friction & heat between mechanical components, prevent the breakdown of devices, and, most importantly, prevent the food from entering contaminated. However, the food grade lubricants market is highly fragmented, and product differentiation is essential, with several brands competing for attention.

### Increasing Food Grade Regulation

The increasing concern for reducing foodborne illness and promoting hygiene factors in food processing facilities positively impacts the food grade lubricants market growth. The U.S. Food and Drug Administration (FDA), National Sanitation Foundation (NSF), the European Food Safety Authority (EFSA), and the Canadian Food Inspection Agency (CFIA) are the regulatory bodies that monitor the use of components in food grade lubricants to mitigate the risk of cross-contamination from both biological agents such as a microorganism, and chemical agents, such as toxins, mutagens, or carcinogens, to avoid foodborne disease, and ensures customers about the safety of the food product.

### Performance Limitations of H1 Food Grade Lubricants

The major challenge faced in the food grade lubricant industry is the performance limitation of H1 food-grade lubricant. As per USDA regulation, the top 10 parts per million of oil are allowed in the H1 food-grade rule or lubricant that comes in contact with food. This exhibits that H1 food-grade lubricant is not safe in those machines producing moderate or small quantities of food. In addition, it can adversely affect the performance of the devices in terms of rust and corrosion. Similarly, H1 food grade lubricant is not optimal for a can seaming machine. Relatively solid or dry oil is required to generate high friction, wear, and heat. Hence, there are high chances of food contamination due to these circumstances.

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## MARKET SEGMENTATION OVERVIEW

H1 lubricants are estimated to be the largest segment in the food grade lubricants market. H2 food grade lubricant is expected to dominate the market during the forecast period and is projected to witness higher growth. H1 lubricants are a globally recognized certification used in the food & beverage industry where incidental food contact is possible. It is used across food & beverage processing machines such as conveyor belts, pumps, and mixers for blending, canning, cutting, cooking, slicing, peeling, brewing, and bottling. Food grade lubricants certified with NSF-H1 ensures the safety standard of the food, and the chemical constituted in the lubricating oils are non-toxic, thus eliminating the chances of foodborne disease.

The mineral oil market held the largest share in the food grade lubricants market in 2021; however, the synthetic lubricant market is expected to lead the industry during the forecast period. Food grade lubricant is highly formulated with white mineral oil where possible incidental food contact. It is a highly refined premium quality base oil with no additives. It offers excellent protection against rust, and corrosion offers oxidative stability and protects the equipment from wear & tear.

The food-grade lubricating oils are primarily used across food & beverages, cosmetics, pharmaceuticals, and animal food processing plants. In the future also, the food industry is expected to dominate the market during the forecast period. This is primarily due to the rising demand for bakery food, dairy products, cereals, seafood, poultry, and ready-to-eat food driven by the increasing population and the increasing purchasing power, specifically in emerging economies. For instance, according to the United Nations (U.N.) report, by 2030, the global population is expected to reach 8.5 billion.

### Segmentation by Base Oil

- ☐ Mineral
- ☐ Synthetic
- ☐ Bio-Based

### Segmentation by Grade

- ☐ H1
- ☐ H2
- ☐ H3

### Segmentation by Application

- ☐ Food
- ☐ Pharmaceutical
- ☐ Cosmetic
- ☐ Beverage
- ☐ Others

APAC was the 3rd largest and fastest-growing food grade lubricants market. China led the region as food grade oils are highly used due to the massive presence of food processing, medicine & its supplements, and the animal feed processing industry. The outbreak of Covid-19 played a vital role in stimulating the demand for packaged and quick-frozen foods due to the strict regulations enforced in China. In 2021, the production volume increased by 6.3% despite continued lockdowns and virus spread. Countries such as India, South Korea, and Japan are also supporting the market growth due to the country's rising young and middle-class population and purchasing power. For instance, India's middle-class population is expected to reach around 800 million people with a spending of 80% by 2030, as per the report by World data. Thus, higher disposable incomes mean an increased demand for packaged food, premium food, and cosmetics, fueling the need for food-grade lubricating oils.

### Segmentation by Region

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- Europe
  - o Germany
  - o France
  - o Russia
  - o Italy
  - o Rest Of Europe
- APAC
  - o China
  - o India
  - o Japan
  - o Indonesia
  - o Australia
  - o Rest of APAC
- Latin America
  - o Brazil
  - o Mexico
  - o Rest Of Latin America
- Middle East & Africa
  - o Turkey
  - o Egypt
  - o Iran
  - o Rest of MEA

## COMPETITIVE ANALYSIS

The competitive scenario in the global food grade lubricants market is currently intensifying. The rapidly changing technological environment and sustainability scenario can adversely affect vendors as customers expect continual innovations and upgrades. The market is fragmented, with several players providing products with high functionality.

### Key Vendors

- Exxon Mobil Corporation
- TotalEnergies
- FUCHS
- Petro Canada Lubricants
- Castrol

### Other Prominent Vendors

- Valvoline Inc.
- Kluber Lubrication
- Metalube
- Renewable lubricants
- Cortec Corporation
- Interflon

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- Repsol
- Haynes Lubricants
- DuBois Chemicals
- Lubriplate Lubricants Company
- Carl Bechem Lubricant India Private Limited
- Mosil Lubricants
- Petrelplus Inc.
- Vinayak Oil
- Condat
- Addinol

#### KEY QUESTIONS ANSWERED

1. □ WHAT IS THE SIZE OF THE FOOD GRADE LUBRICANTS MARKET?
2. □ WHAT IS THE GROWTH RATE OF THE FOOD GRADE LUBRICANTS MARKET?
3. □ WHAT ARE THE GROWTH FACTORS IN THE FOOD GRADE LUBRICANTS MARKET?
4. □ WHO ARE THE KEY PLAYERS IN THE FOOD GRADE LUBRICANTS MARKET?
5. □ WHICH REGION HOLDS THE LARGEST SHARE IN THE FOOD GRADE LUBRICANTS MARKET?

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  - 26.3 APPLICATION
    - 26.3.1 FOOD PROCESSING EQUIPMENT

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26.3.2 PHARMACEUTICAL

26.3.3 COSMETIC

26.3.4 BEVERAGES

26.3.5 OTHERS

27 GEOGRAPHY

27.1 NORTH AMERICA

27.1.1 GRADE

27.1.2 BASE OIL

27.1.3 APPLICATION

27.2 EUROPE

27.2.1 GRADE

27.2.2 BASE OIL

27.2.3 APPLICATION

27.3 LATIN AMERICA

27.3.1 GRADE

27.3.2 BASE OIL

27.3.3 APPLICATION

27.4 MIDDLE EAST & AFRICA

27.4.1 GRADE

27.4.2 BASE OIL

27.4.3 APPLICATION

27.5 APAC

27.5.1 GRADE

27.5.2 BASE OIL

27.5.3 APPLICATION

28 APPENDIX

28.1 ABBREVIATIONS

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