

Transformer Oil Market - Global Outlook & Forecast 2022-2027

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Report description:

The global transformer oil market is expected to grow at a CAGR of 6.36% during 2022-2027.

MARKET INSIGHTS

-□ Due to the booming construction and infrastructure industry, the electricity demand has increased with the increasing demand for residential housing and the commercial sector over the past few years. Such factors are majorly contributing to the growth of the global transformer oil market.

-□ The global transformer oil market volume is expected to reach 2,584.99 kilotons by 2027. Transformers oil or insulating oil, or dielectric fluid, is an oil that is stable at high temperatures with the best electrical insulating properties. This type of oil is used in wet transformers or oil-filled transformers, some high-voltage switches, circuit breakers, and high-voltage capacitors. The primary purpose of transformer oils is to insulate and maintain the temperature. Therefore, transformer oil must have the properties such as dielectric strength, chemical stability, thermal conductivity, and the ability to hold these properties for a longer duration.

-□ The electricity distributors and industrial manufacturers regularly perform maintenance activities to avoid any transformers malfunctioning or interrupting electricity distribution. In addition, the increasing global population and use of various appliances have increased the per capita demand for electricity. Therefore, the global transformer oil market is expected to increase significantly due to the abovementioned factors. Further, transformer oil market manufacturers have invested much capital in R&D to develop improved products to offer prolonged service life, oil purification, and low environmental impact.

MARKET DRIVERS & OPPORTUNITES

-□ Expansion in Cross-Border Electricity Trade

The cross-border electricity trade is increasing in Asia as the countries such as India, Bhutan, Nepal, Bangladesh, Shri Lanka, Thailand, Malaysia, and Singapore have established an electrical grid that helps in electricity trade. This trade can be bilateral unidirectional and bilateral bidirectional. The evolving electricity industry in India is expected to improve the demand for

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cross-border electricity trade in South Asia. Similarly, the various countries in this region have laid down some net zero emission policies projected to boost the demand for renewable power generation. This increase in renewable power generation is expected to increase the cross-border electricity trade. The existing cross-border electricity trade in south Asian countries such as India, Bhutan, Bangladesh, and Nepal has established a foundation that will build a good relationship that could result in easy electricity trade on a regional level.

-□Expansion of Electric Grid in Emerging Economies

Industrialization drives economic growth in emerging economies. Emerging economies contribute almost 60% to the annual global growth as industrial development in China and India is high. In 2021, around 37 emerging countries accounted for 80% of the global population and approximately 70% of the world's gross domestic product (GDP) growth generated through emerging economies, according to the International Monetary Fund (IMF). Emerging economies, especially India, China, and Brazil, represent profitable opportunities for the electricity industry due to their large populations. Oil & gas, agriculture, automotive, and pharmaceutical industries are major demand generators in emerging economies. Therefore, the electrical grid is expanding in emerging economies to cater to the increasing electricity demand due to industrial development. This expansion in the electrical grid is projected to increase the use of various types of transformers for the transmission & distribution of electricity. Hence the demand for the transformer oil market is expected to grow significantly.

INDUSTRY RESTRAINTS

-□Increasing Demand for Dry-Type Transformers

A dry-type transformer is a stationary solid-state device that requires minimal maintenance to function properly. There are no moving components in this transformer. Unlike liquid fill transformers, this transformer uses only high-temperature insulating technologies, which are extremely ecologically friendly. These transformers provide a safe and steady power supply that does not require fire-resistant vaults, poisonous gas emissions, or catch basins. These safety features will enable these transformers to be used in various applications where fire safety is necessary, such as schools, buildings, hospitals, factories, and chemical plants. This transformer does not employ a liquid-like silicone or oil to cool the core and coils. Therefore, the demand for dry transformers is expected to grow significantly due to the low cost of production and maintenance. Therefore, the need for oiled transformers is expected to decrease, likely negatively impacting the transformer oil market.

SEGMENTATION REVIEW

INSIGHTS BY END USER

Based on end users, the global transformer oil market is segmented into transmission & distribution, power generation, railways & metros, and others. Among the end-user segment, the transmission & distribution is expected to be the largest segment in the industry with a market value of USD 1.10 billion in 2021. As a result, transformer oils are essential for keeping these transformers in good operating order. Transmission & distribution is one of the most critical industries for transformer oil, as numerous types of transformers are utilized in the transmission & distribution of power.

Segmentation by End User

- Transmission & Distribution
- Power Generation
- Railways & Metros
- Others

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INSIGHTS BY Oil Type

Mineral oil is the largest segment amongst others in the transformer oil market. Mineral oil dominates the global industry as the ability to mix with a large number of additives. But in the future, the dominance of mineral oil in the transformer oil market is expected to decline due to the introduction of silicone-based and bio-based transformer oil. Also, developed countries such as the U.S., Germany, and Japan are concerned about the environmental impact of mineral oils; therefore, the respective government has laid down stringent regulations for transformer oils.

Segmentation by Oil Type

- Mineral Oil
- Silicone Oil
- Bio-based Oil

GEOGRAPHICAL ANALYSIS

APAC is the largest global transformer oil market and is estimated to cross USD 1.4 billion by 2027. Asia Pacific region is the leading market because of its rapidly developing infrastructure, readily increasing population, and demand for various industries such as food & beverage, aerospace, automotive, power generation, and manufacturing. Furthermore, demand for power generation is expected to grow significantly as the APAC region population has grown tremendously in recent years.

South Asian countries are also engaging in cross-border electricity trade, which has boosted the transformer oil market demand. Even though APAC is a dominant industry in the world, many other countries with a high scope of development in transformer oil will challenge APAC's dominance. Regions such as North America and Europe have the most developed countries comprising various well-established industries requiring significant electricity.

North America is the 3rd largest market for transformer oil, and it is expected to grow at a considerable rate of 5.70% during the forecasted period. The oil & gas industry is a significant contributor to economic development in North America as North America is the largest crude oil manufacturer in the world. In addition, North America is one of the major hubs for the manufacturing sector that contributes significantly to various industries such as automotive, oil & gas, chemicals, and others. The North American region is home to many industrial lubrication manufacturers due to the high production and processing of oil & gas. Companies such as ExxonMobil, Valvoline, and Petro Canada have headquarters in the North American region. The U.S. and Canada are contributing to North America's high demand for transformer oil.

Segmentation by Geography

- APAC
 - o□ China
 - o□ India
 - o□ Japan
 - o□ Indonesia
 - o□ South Korea
 - o□ Rest of APAC
- North America
 - o□ U.S.
 - o□ Canada
- Europe
 - o□ Germany

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- o Russia
- o Italy
- o UK
- o France
- o Spain
- o Rest of Europe
- Latin America
 - o Brazil
 - o Mexico
 - o Argentina
 - o Rest of Latin America
- Middle East & Africa
 - o Iran
 - o Saudi Arabia
 - o South Africa
 - o Rest of MEA

VENDOR LANDSCAPE

The key companies in the global transformer oil market have formed strategic partnerships with transmission and distribution service providers and the various industries that use oil transformers. This gives companies a competitive advantage that boosts their industry share. The key companies have undertaken different strategies to grow in the transformer oil market. Companies in the transformer oil industry compete strategically. The growth in sustainable processes and initiatives has challenged all companies globally. Investments in R&D, technological advancement, and environmental and economic challenges drive the demand for innovative and sustainable transformer oil products.

Some major players in the global transformer oil market include Chevron Corporation (U.S.), Shell (U.K.), Cargill (U.S.), DOW (U.S.), and Total Energies (France). These players have adopted strategies such as expansion, acquisitions, new product development, joint ventures, and others to increase their revenues in the transformer oil market. Furthermore, other prominent companies such as HPCL(India), BPCL(India), Phillips 66(US), APAR(India), Nyas AB(Sweden), Petro China (China), and others have invested significant capital in R&D to develop transformer oil products that will appeal to the customers. Therefore, these other prominent companies give tough competition to major companies in the industry.

Key Vendors

- Chevron Corporation
- Dow
- ExxonMobil
- Shell PLC
- TotalEnergies

Other Prominent Vendors

- APAR Industries
- Bharat Petroleum Corporation Limited
- Calumet Specialty Products Partners, L.P.
- Cargill Incorporated
- Castrol Limited
- Engen Petroleum Limited

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- Ergon Inc.
- Gandhar Oil
- Gulf Oil India Lubricants Limited
- Hydrodec Group PLC
- Indian Oil Corporation Limited
- Nynas AB
- Petro Canada Lubricants
- PetroChina
- Philips 66
- Repsol
- Sinopec
- Valvoline Inc.

KEY QUESTIONS ANSWERED

- 1.□What is the revenue from the global transformer oil market?
- 2.□What is the projected market size of the global transformer oil market by 2027?
- 3.□What is the growth rate of the transformer oil market?
- 4.□Which region dominates the global transformer oil market?
- 5.□What are the key driving factors in the transformer oil market?
- 6.□Who are the key players in the global transformer oil market?

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