

**White Oil Market - Global Industry Size, Share, Trends, Opportunity & Forecast, Segmented By Application (Adhesives, Agriculture, Food, Pharmaceutical, Personal Care, Textile, Polymers, Others), By Region, & Competition, 2020-2030F**

Market Report | 2025-09-14 | 180 pages | TechSci Research

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**Report description:**

Market Overview

The White Oil market was valued at USD 2.25 Billion in 2024 and is expected to reach USD 2.88 Billion by 2030 with a CAGR of 4.18%. The Global White Oil Market occupies a critical niche within the specialty oil segment, serving high-precision applications across industries such as pharmaceuticals, personal care, food-grade manufacturing, polymer processing, textiles, and industrial equipment lubrication. Also referred to as mineral oil or liquid paraffin, white oil is a highly purified, chemically inert petroleum derivative, valued for its colorless, odorless, and non-toxic characteristics. These properties make it essential in processes where product safety, regulatory conformity, and material consistency are non-negotiable.

Given its integral role in regulated and quality-sensitive applications, the white oil market is not only technically indispensable but also strategically positioned for sustained expansion. Demand is increasingly being driven by evolving manufacturing standards, stricter compliance requirements in pharmaceuticals and food processing, and the growing need for inert process aids in polymer and cosmetic production. Technological advancement in ultra-pure refining capabilities, Proactive adaptation to regional regulatory frameworks, and Targeted expansion into high-growth, application-specific markets, particularly in Asia-Pacific and Latin America.

Industry players that align their portfolio with these dynamics by investing in value-added grades, application-specific customizations, and certification-backed production processes will be best positioned to capture long-term growth in an increasingly quality-driven and compliance-oriented market environment.

Key Market Drivers

Expanding Pharmaceutical and Personal Care Industries

The pharmaceutical and personal care industries represent two of the most influential demand centers for white oil globally. Their sustained expansion, driven by demographic shifts, consumer trends, and healthcare advancements, has created a strong and

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stable growth engine for the white oil market. White oil, particularly in pharmaceutical-grade formulations, is a key excipient used for its chemical stability, purity, and non-reactive nature. Used as a carrier or base in topical ointments, creams, and gels. Commonly found in oral preparations like soft gel capsules. Functions as a lubricant in tablet and capsule manufacturing. The global population is undergoing a pronounced demographic shift, marked by a rapidly increasing share of individuals aged 65 and above. This trend is primarily driven by rising life expectancy and sustained declines in birth rates across both developed and emerging markets. Since 1974, the proportion of the global population aged 65+ has nearly doubled, and current projections indicate it will double again by 2074 and rising chronic disease prevalence are leading to increased consumption of pharmaceutical products, especially in North America, Europe, and parts of Asia. Healthcare penetration in emerging economies (India, Southeast Asia, Africa) is expanding rapidly, supported by public and private investments. Increasing regulatory emphasis on high-purity ingredients in drug manufacturing is pushing demand for white oils that meet stringent pharmacopoeial standards (e.g., USP, EP, IP). White oils used in pharmaceuticals are highly refined and undergo rigorous testing to comply with global safety standards. Their inert and hypoallergenic nature makes them suitable for sensitive applications, giving manufacturers confidence in formulation safety.

In the personal care and cosmetics sector, white oil is widely used due to its moisturizing properties, excellent spreadability, and skin-friendly characteristics. Emollient in products such as body lotions, creams, baby oils, and hair oils. Carrier oil in fragrances and makeup formulations. Base material in cleansing products and moisturizers, especially for sensitive skin types. India's consumer sector is emerging as a critical driver of national economic growth, fueled by rising disposable incomes and expanding middle-class spending power. By 2027, approximately 100 million Indians are projected to have annual incomes exceeding \$10,000, signaling a significant shift in consumption patterns toward premium products, discretionary goods, and lifestyle services and urbanization have led to increased spending on beauty and personal care products, particularly in Asia-Pacific and Latin America. Growing consumer preference for gentle, non-comedogenic ingredients has encouraged manufacturers to use white oil as a safe, dermatologically tested base. The global rise of baby care products including oils, wipes, and lotions also contributes significantly, as white oil is a primary ingredient due to its mildness and safety. Premiumization of skincare and haircare brands has led to the demand for higher-quality, ultra-refined ingredients. By 2025, online channels are projected to account for 21% of total global retail sales, with this figure expected to increase to 22.6% by 2027, reflecting a steady shift in consumer purchasing behavior toward digital platforms. Supporting this growth, the global eCommerce ecosystem now comprises over 28 million online stores, spanning both large-scale marketplaces and niche direct-to-consumer brands.

#### Key Market Challenges

##### Volatility in Crude Oil Prices and Raw Material Dependency

White oil is a highly refined derivative of petroleum, and its production is intrinsically linked to the upstream oil and gas industry. As a result, fluctuations in crude oil prices directly impact production costs and supply chain stability. Any disruption in crude oil supply due to geopolitical tensions, natural disasters, or OPEC policies can lead to raw material shortages or cost spikes for base oils used in white oil production. Producers dependent on imported crude or base stocks may face additional logistics challenges and foreign exchange risks. In periods of rising crude prices, refiners and blenders may struggle to maintain stable pricing for white oil, especially in price-sensitive industries like textiles and plastics. End-users may shift to cheaper synthetic or vegetable-based alternatives, leading to demand substitution. Producing high-quality, ultra-pure white oil requires advanced refining infrastructure, which is expensive to build and maintain. Smaller players may be unable to invest in the necessary technology when faced with raw material price volatility.

#### Key Market Trends

##### Customization and Product Differentiation Across End-Use Segments

A growing number of end-user industries are demanding tailor-made white oil grades to meet specific performance, purity, or compliance requirements. This trend is fueling a shift from standardized bulk products to highly specialized formulations. Manufacturers are developing sector-targeted white oils for unique applications such as ultra-low-volatility grades for medical devices, or food-grade lubricants optimized for high-speed filling lines. In personal care and cosmetics, brands are requesting lighter or heavier oil textures, varying levels of viscosity, or enhanced compatibility with natural actives. Custom white oils are increasingly integrated with performance additives, such as antioxidants or anti-static agents, which extend functionality without compromising purity. This allows producers to move away from commoditized pricing and position their products as

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premium-grade materials. Customization enhances customer retention, creates new revenue streams, and supports long-term supply agreements, giving white oil producers a competitive edge in fragmented markets.

#### Key Market Players

- BP International Limited
- RENKERT OIL
- Exxon Mobil Corporation
- ENEOS Corporation
- NYNAS AB
- Petro Canada (Suncor Energy Inc)
- Shell plc
- China Petrochemical Corporation
- S-OIL CORPORATION
- Sasol Limited

#### Report Scope:

In this report, the Global White Oil Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### -□White Oil Market, By Application:

- o Adhesives
- o Agriculture
- o Food
- o Pharmaceutical
- o Personal Care
- o Textile
- o Polymers
- o Others

#### -□White Oil Market, By Region:

- o North America
  - United States
  - Canada
  - Mexico
- o Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- o Asia-Pacific
  - China
  - India
  - Japan
  - Australia
  - South Korea
- o South America
  - Brazil
  - Argentina
  - Colombia
- o Middle East & Africa

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- South Africa
- Saudi Arabia
- UAE

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global White Oil Market.

#### Available Customizations:

Global White Oil market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

-□ Detailed analysis and profiling of additional market players (up to five).

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