

**White Oil Market Report by Application (Adhesive, Agriculture, Food, Pharmaceutical, Personal Care, Textile, Polymers, and Others), and Region 2025-2033**

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**Report description:**

The global white oil market size reached USD 2.18 Billion in 2024. Looking forward, IMARC Group expects the market to reach USD 2.83 Billion by 2033, exhibiting a growth rate (CAGR) of 2.82% during 2025-2033. The market is witnessing stable growth, primarily driven by its extensive utilization in key sectors like plastics, cosmetics, and pharmaceuticals. In addition, the heightening demand for personal care products further bolsters market expansion. Major companies are currently focusing on innovation to improve their product safety standards and quality, which, in turn, is favoring the market growth.

**White Oil Market Trends:**

**Increasing Product Demand in Cosmetics and Pharmaceuticals**

The cosmetics and pharmaceuticals sectors are significantly propelling the demand for white oil, which is valued for its high safety and purity standards. Its utilization as a base in therapeutic creams, personal care products like lotions and creams, and other topical formulations is notably escalating. Furthermore, regulatory adherence in these industries demands non-toxic, ultra-purified, and odorless oils, positioning high-quality production as an essential requirement to cater to such standards. Moreover, this trend is anticipated to boost as the global personal care and cosmetics sector is substantially expanding and healthcare needs are magnifying, further fueling white oil consumption in applications pertaining to these sectors. According to industry reports, cosmetics market was valued as USD 400 billion in 2023 and is forecasted to reach around USD 600 million in 2030, with a CAGR of 5%.

**Expanding Product Application in Polymers and Plastics**

White oil is witnessing accelerated utilization in the polymer and plastics sectors as a release agent, lubricant, and plasticizer in the formulation of poly vinyl chloride, elastomers, and polyolefins. The capability of white oil to improve product functionality while maintaining adherence with regulatory policies as well as safety is significantly driving its demand in these industries.

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Moreover, the packaging and automotive sectors, in particular, are leveraging white oil for its excellent role in enhancing the durability and flexibility of polymers used. As per industry reports, plastic is the second most leveraged material in the automotive sector, with 12% to 15% of vehicle's mass composed of it. Consequently, the utilization of white oil in such industries is anticipated to escalate as the emphasis on lightweight plastics and high-performance materials is rapidly elevating.

#### Rising Focus on Bio-based Alternatives and Sustainability

The rising trend of sustainability is significantly impacting the dynamics of global white oil market, primarily because of the heightening demand for bio-based, eco-friendly alternatives among buyers. While conventional white oil is extracted from petroleum, a magnifying shift is currently being observed towards bio-based oils derived from renewable sources. This transitioning inclination streamlines with global efforts to lower carbon footprints and adhere to the stringent environmental regulatory policies. As per industry reports, the average global carbon footprint is almost around 4 tons., while in the U.S., average carbon footprint for an individual is 16 tons, one of the highest rates worldwide. As a result, such trends have further prompted the manufacturers to adopt sustainable practices within the white oil industry. In addition, well-established market players are substantially investing in research and development (R&D) projects to develop bio-based formulations that can efficiently match the functionality of mineral-based white oil, thereby contributing to the differentiation of offerings and the future expansion of the market.

#### White Oil Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2025-2033. Our report has categorized the market based on application.

#### Breakup by Application:

- Adhesive
- Agriculture
- Food
- Pharmaceutical
- Personal Care
- Textile
- Polymers
- Others

#### Personal care accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the application. This includes adhesive, agriculture, food, pharmaceutical, personal care, textile, polymers, and others. According to the report, personal care represented the largest segment.

The personal care segment represents the largest market share for white oil, chiefly driven by its widespread utilization in products such as hair care formulations, creams, and lotions. Since white oil is exceptionally stable, non-toxic, and pure in nature, it has emerged as an ideal ingredient in skincare and cosmetics sector. In addition, the escalating requirement for high-grade personal care products, combined with rising awareness regarding skin health and safety, significantly contributes to its domination in this segment. Moreover, manufacturers are currently focusing on innovations to address the strict quality policies, fortifying the segment's leadership in the global market.

#### Breakup by Region:

- North America
  - o□ United States
  - o□ Canada
- Asia-Pacific
  - o□ China
  - o□ Japan
  - o□ India

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- o South Korea
- o Australia
- o Indonesia
- o Others
- Europe
- o Germany
- o France
- o United Kingdom
- o Italy
- o Spain
- o Russia
- o Others
- Latin America
- o Brazil
- o Mexico
- o Others
- Middle East and Africa

Asia Pacific leads the market, accounting for the largest white oil market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

According to the report, Asia Pacific represents the largest regional market for white oil.

Asia Pacific accounts for the largest white oil market share mainly driven by accelerating industrialization, heightening demand for premium lubricant, and expanding key industries, including polymer, pharmaceutical, and personal care. Countries, particularly India and China, are major contributors, supported by their resilient manufacturing sectors and magnifying customer expenditure on both cosmetics and healthcare. As per industry reports, consumers in India spent around ₹5,000 crore on more than 100 million cosmetic products in the first half of 2023. In addition, the region's robust growth in end-use sectors, combined with innovations in production methodologies, further strengthens its leadership in the market. Moreover, tactical investments in the white oil projects improve supply chain efficiency, contributing to a positive white oil market outlook in Asia Pacific.

#### Competitive Landscape:

- The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the white oil industry include Bharat Petroleum Corporation Limited, Calumet Specialty Products Partners L.P., China Petroleum & Chemical Corporation, ExxonMobil Corporation, H&R GmbH & Co. KGaA, Nynas AB, Petro-Canada Lubricants Inc. (Hollyfrontier Corporation), Renkert Oil Inc., Royal Dutch Shell Plc, Sasol Limited, Savita Oil Technologies Limited, and Total SE.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

- The competitive landscape is characterized by the presence of several well-established players that are currently emphasizing on proliferating their distribution networks, product development, and quality improvement. These companies are also investing significantly in research and development activities to adhere to the strict regulatory protocols, especially in cosmetics and pharmaceuticals industries. In addition, strategic partnerships and acquisitions are prevalent, aiming to solidify market presence and expand product portfolios. For instance, in May 2024, Sonneborn, a prominent white oil producer, announced a tactical partnership with IMCD, a leading specialty chemicals distributor. As per the agreement, IMCD will act as a distribution partner for Sonneborn products in selected regions. This partnership is anticipated to improve consumer access to Sonneborn's high-grade

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offerings and expand company's foothold. Furthermore, key market players are also focusing on eco-friendly practices and sustainability to cater to the increasing buyer demand for premium, exceptionally pure oils across numerous end-use sectors.

**Key Questions Answered in This Report:**

- How has the global white oil market performed so far, and how will it perform in the coming years?
- What are the drivers, restraints, and opportunities in the global white oil market?
- What is the impact of each driver, restraint, and opportunity on the global white oil market?
- What are the key regional markets?
- Which countries represent the most attractive white oil market?
- What is the breakup of the market based on the application?
- Which is the most attractive application in the white oil market?
- What is the competitive structure of the market?
- Who are the key players/companies in the global white oil market?

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