SCOTTS INTERNATIONAL

White Oil - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

White Oil Market Analysis

The global white oil market stood at 1.51 million tons in 2025 and is projected to expand to 1.61 million tons by 2030, reflecting a 1.25% CAGR over 2025-2030. Quiet topline growth conceals fast-moving shifts in product purity demands, regional sourcing strategies, and end-use mix reshaping industry margins. Asia Pacific anchors the white oil market with heavy consumption in personal care, pharmaceuticals, and plastics processing, while Europe steers worldwide quality benchmarks through MOAH/MOSH limits that require higher purity grades. Personal care remains the largest application and the fastest-growing lane, helped by the region's taste for light, transparent skincare bases. Group II feedstocks dominate supply despite the tighter availability of low-sulfur vacuum gas oil after IMO-2020, driving refiners toward hydro-processing upgrades and selective investments in GTL pathways. Competition stays moderate in concentration, with ExxonMobil, Shell, and Sinopec defending high-purity niches and regional firms carving value in technical grades, especially across India, China, and the Gulf.

Global White Oil Market Trends and Insights

Surge in APAC Biologics Fill-Finish Lines Driving USP-Grade Demand

Biologics manufacturers across China, South Korea, and India are scaling sterile fill-finish lines that require USP-grade white oils for precision lubrication of plungers, stoppers, and integrated conveyors. Facilities specify aromatic contents lower than USP thresholds to eliminate extractables that could trigger protein aggregation. Curia Global's recent fill-finish expansion typifies the trend, with dedicated lubricant audits embedded in technology transfer packages.

Europe's MOAH/MOSH Regulations Reshaping Food Packaging Standards

The European Food Safety Authority confirmed carcinogenic risk from MOAH fractions containing three or more rings, pushing converters to adopt food-grade white oils with ultra-low aromatics for coatings, inks, and greases. Maximum MOAH limits of 0.5 mg/kg in vegetable-oil packaging and 0.1 mg/kg in infant formula boards become binding by early 2026, effectively exporting EU purity norms to global supply chains.

EU Micro-plastic Directive Reshaping Cosmetic Formulations

The Commission's drive to cut micro-plastic release by 30% by 2030 accelerates reformulation away from mineral-oil ingredients in leave-on skincare. Nordic Swan and EU Ecolabel criteria already ban select mineral derivatives, and brand owners adopt plant-derived substitutes to secure ecolabel compliance, squeezing demand for cosmetic-grade white oils.

Other drivers and restraints analyzed in the detailed report include:

Indian Ayurvedic Cosmetics Boom Fueling Specialized Formulations / Expansion in Polymer and Plastic Processing / North American Infant Food Manufacturers Embracing Bio-based Alternatives /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Pharmaceutical grade delivered 66% of the white oil market size in 2024. Pharmaceutical-grade oils fetch premiums multiple times above technical variants, yet grow from a smaller base. Compliance with USP, EP, and JP monographs and bacterial endotoxin testing raises entry barriers, concentrating supply among a few global refiners. Demand tracks expansion in biologics, ophthalmic gels, and medical-device lubricants, supporting a 1.29% CAGR over the forecast window. Strategic investment in gas-to-liquids trains gives players such as Shell a differentiation edge thanks to virtually sulfur-free feed.

Group II oils commanded 67% of the white oil market in 2024 and are slated for a 1.69% CAGR through 2030. Hydro-processing removes hetero-atoms, producing colorless, odorless stocks that satisfy most technical and mid-tier pharmaceutical applications. New capacity in Shandong and Yeosu offsets some supply pinch born from IMO-2020's diversion of sweet crudes into LSFO pools, yet refiners still juggle run plans to protect feedstock streams.

Group III volumes remain lower but edge up as EU and US buyers tighten aromatic thresholds. Heavier hydro-cracking plus isomerization yields base oils under 6 ppm aromatics, suited for food and infant-care uses where MOAH is tightly regulated. Naphthenic oils stay niche, filling low-temperature processing and textile spin-finish roles. Concawe's research confirms that refining severity rather than crude origin primarily governs the toxicological profile.

The White Oil Market Report Segments the Industry by Grade (Technical/Industrial Grade and Pharmaceutical Grade), Base Oil (Group I, Group II, Group III, and Naphthenic), Viscosity (Low, Medium, and High), Application (Plastics and Elastomers, Adhesives, Personal Care, Pharmaceuticals, and More), and Geography (Asia-Pacific, North America, Europe, and More). The Market Forecasts are Provided in Terms of Volume (Tons).

Geography Analysis

Asia Pacific owns 63% of the white oil market in 2024, with China, India, and South Korea combining heavy draw from personal care, pharmaceutical fill-finish, and polymer processing. Regional suppliers escalate hydrotreater throughput, yet rising quality specs keep premium imports attractive for drug and infant-nutrition plants. Government stimulus for advanced manufacturing, plus demographic expansion, sustains a 1.29% CAGR for the region.

Europe follows at a distance but wields outsized regulatory influence. Implementation of MOAH caps reshapes grade definitions globally, prompting multinational converters to standardize on European purity even for factories in Latin America and Africa. The region also consumes higher shares of pharmaceutical and topical personal-care oils, supported by aging populations and innovation in derma-cosmetics.

North America holds a stable slice, pivoting toward premium and sustainable options. Infant-formula producers trial bio-based crop-ester plasticizers, trimming mineral oil content in packaging. Nevertheless, stringent FDA references to USP and EP monographs keep pharmaceutical-grade demand unwavering. United States-based refiners benefit from shale-derived feed but face rising costs to desulfurize residual streams.

List of Companies Covered in this Report:

Apar Industries Ltd. / Asian Oil Company / BP p.l.c / Brenntag SE / Calumet, Inc. / Chevron Corporation / China Petrochemical Corporation / Exxon Mobil Corporation / Gandhar Oil Refinery (India) Limited / H&R GROUP / HF Sinclair Corporation / Indorama Ventures Public Company Limited / LANXESS / Nynas AB / PetroChina Company Limited / RENKERT OIL / Sasol / SAVITA OIL TECHNOLOGIES LIMITED / SEOJIN CHEMICAL CO.,LTD. / Shell plc / Sonneborn LLC / TotalEnergies /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

5.5.3.2 United Kingdom
5.5.3.3 Italy
5.5.3.4 France
5.5.3.5 Nordics
5.5.3.6 Rest of Europe
5.5.4 South America
5.5.4.1 Brazil
5.5.4.2 Argentina
5.5.4.3 Rest of South America
5.5.5 Middle-East and Africa
5.5.5.1 Saudi Arabia
5.5.5.2 Rest of Africa
5.5.5.3 Rest of Middle-East and Africa

6 Competitive Landscape
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)
6.4.1 Apar Industries Ltd.
6.4.2 Asian Oil Company
6.4.3 BP p.l.c
6.4.4 Brenntag SE
6.4.5 Calumet, Inc.
6.4.6 Chevron Corporation
6.4.7 China Petrochemical Corporation
6.4.8 Exxon Mobil Corporation
6.4.9 Gandhar Oil Refinery (India) Limited
6.4.10 H&R GROUP
6.4.11 HF Sinclair Corporation
6.4.12 Indorama Ventures Public Company Limited
6.4.13 LANXESS
6.4.14 Nynas AB
6.4.15 PetroChina Company Limited
6.4.16 RENKERT OIL
6.4.17 Sasol
6.4.18 SAVITA OIL TECHNOLOGIES LIMITED
6.4.19 SEOJIN CHEMICAL CO.,LTD.
6.4.20 Shell plc
6.4.21 Sonneborn LLC
6.4.22 TotalEnergies

7 Market Opportunities and Future Outlook
7.1 White-space and Unmet-Need Assessment
7.2 Increasing Usage from Textiles and Apparel Industry

White Oil - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-04
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com