



FOOD-GRADE LUBRICANTS:

Analysis of Major Markets

Webinar

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Today's Speakers



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» Scope

Food-grade Lubricants: Analysis of Major Markets summarizes the results of Kline & Company's comprehensive syndicated analysis of the food-grade lubricants markets in the following countries/regions:

- China
- European Union and United Kingdom
- India
- Japan
- South Korea
- United States

Growing global food safety awareness, increasing stringency in regulations, and the cost of noncompliance is driving the market for food-grade lubricants. The results of this study provide subscribers with a comprehensive, accurate, and independent appraisal of business opportunities including:

- Demand for food-grade lubricants in select markets in 2020 and forecast to 2025
- Analysis of market trends, growth drivers and restraints, regulations, opportunities and challenges
- Major suppliers and their market shares



Methodology

As a leading consultancy in finished lubricants, Kline & Company has developed an analysis approach based heavily on primary research (field and telephone interviews), combined with in-house modeling and analysis. The study includes Kline's analysis of information gathered through primary as well as secondary research.

This report is primarily based on a series of interviews with industry experts such as:



- Lubricant marketers
- Lubricant distributors
- NSF
- End users of food-grade lubricants

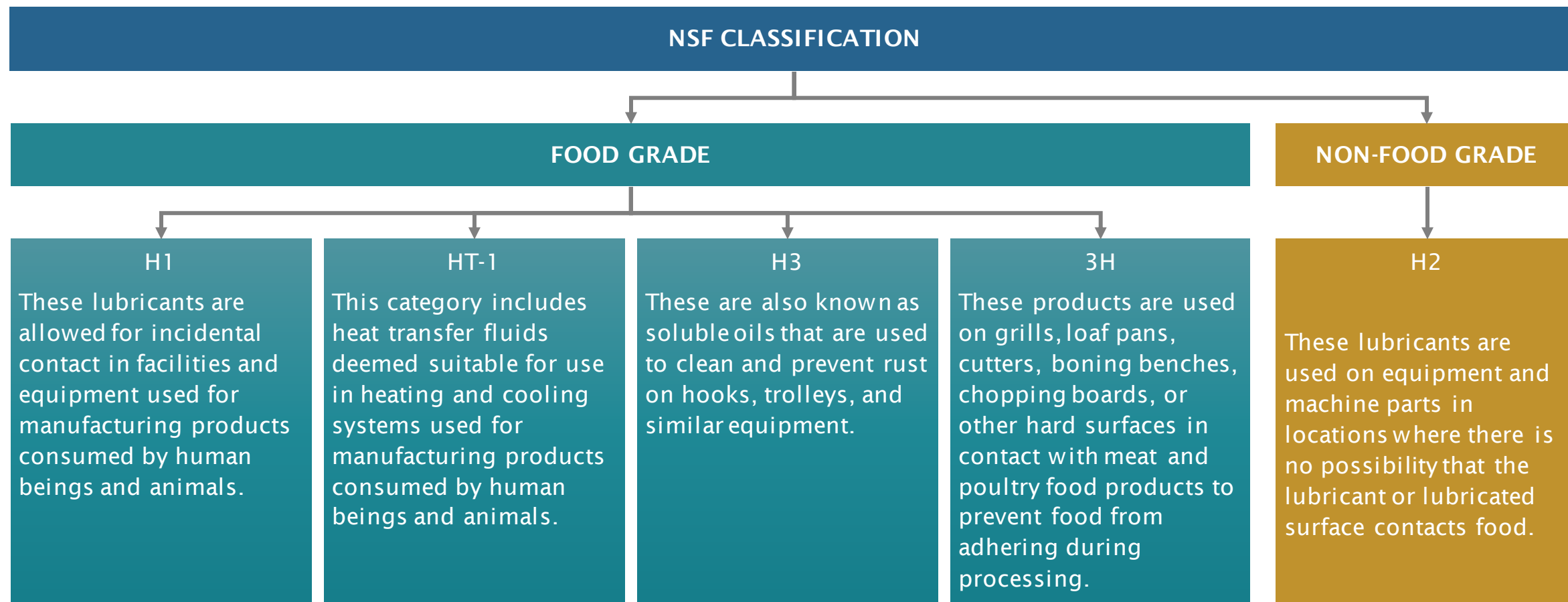
This analysis also draws on secondary sources such as:



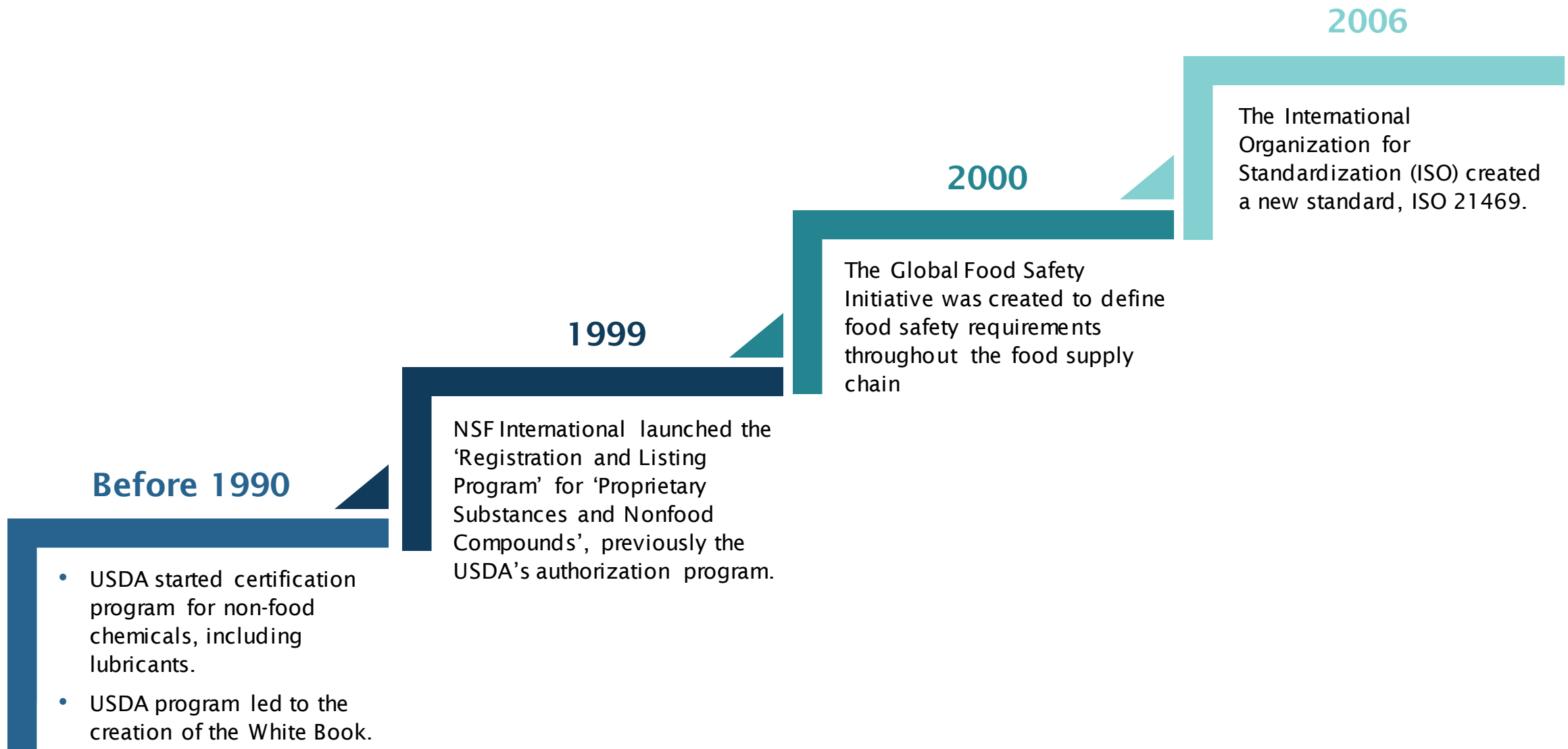
- Product literature and websites of suppliers of food-grade lubricants
- Press releases by lubricant companies
- A search of recent trade and technical literature
- Non-confidential data from Kline & Company's previous work related to lubricants, including syndicated studies

➤ What are food-grade lubricants?

Food-grade lubricants are a special category of industrial lubricants that are considered safe for incidental contact with food and other products consumed or ingested by human beings or animals when used in equipment or machinery that manufacture, pack, treat, process, and transport these products.

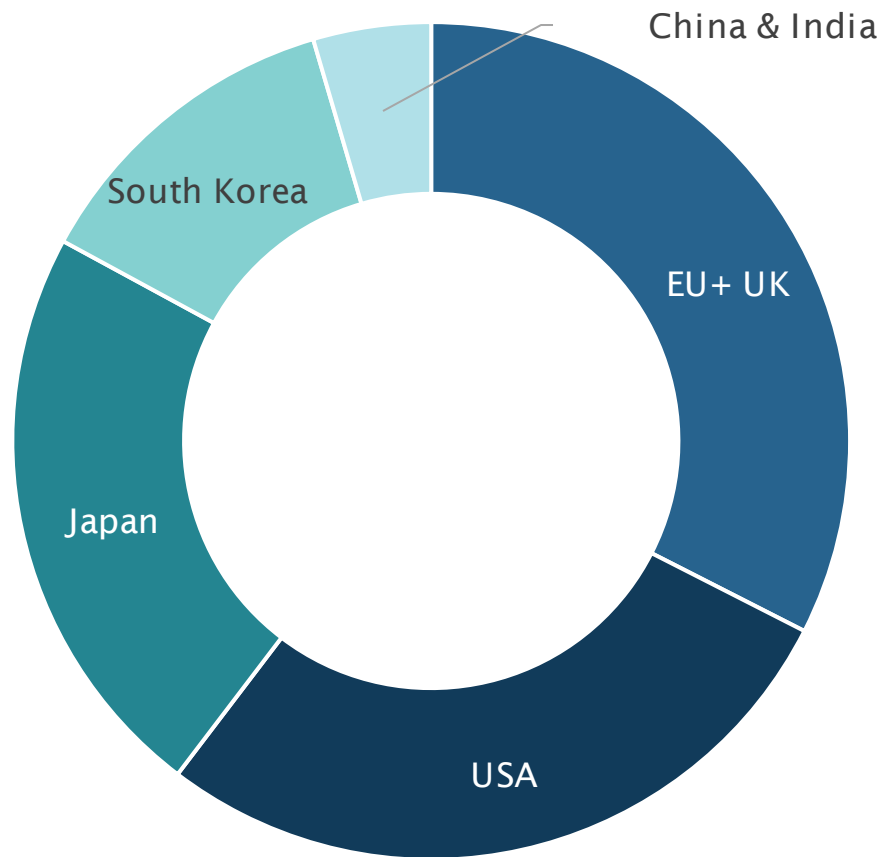


➤ Evolution of Food-Grade Lubricants Related Standards

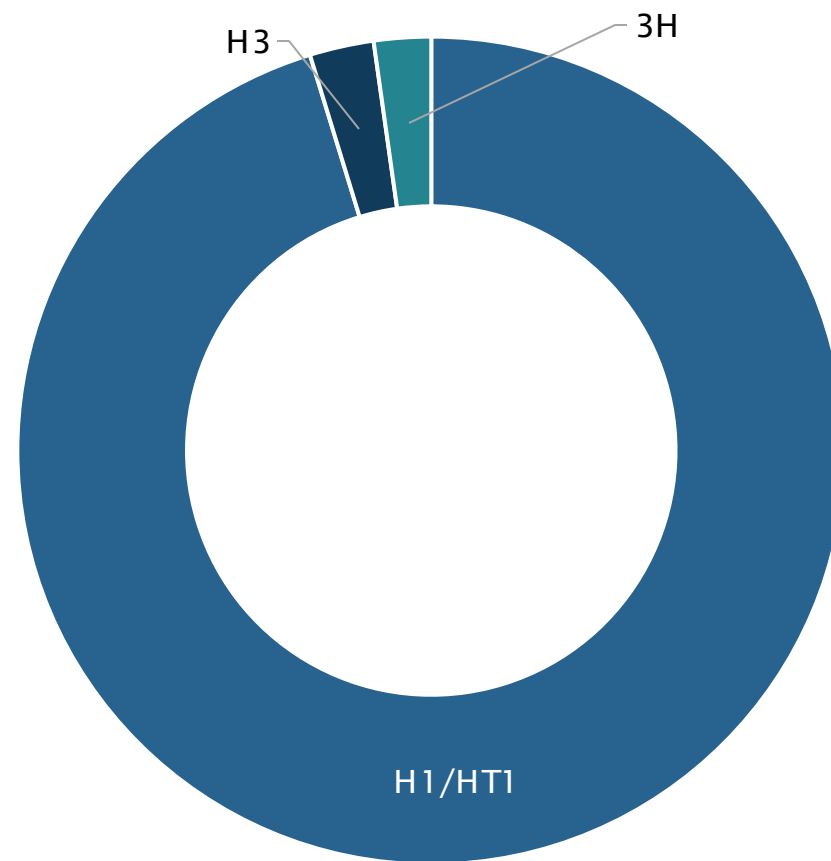


Food-Grade Lubricants by Region and NSF Classification in 2020

DEMAND FOR FOOD-GRADE LUBRICANTS IN SELECT COUNTRIES, 2020



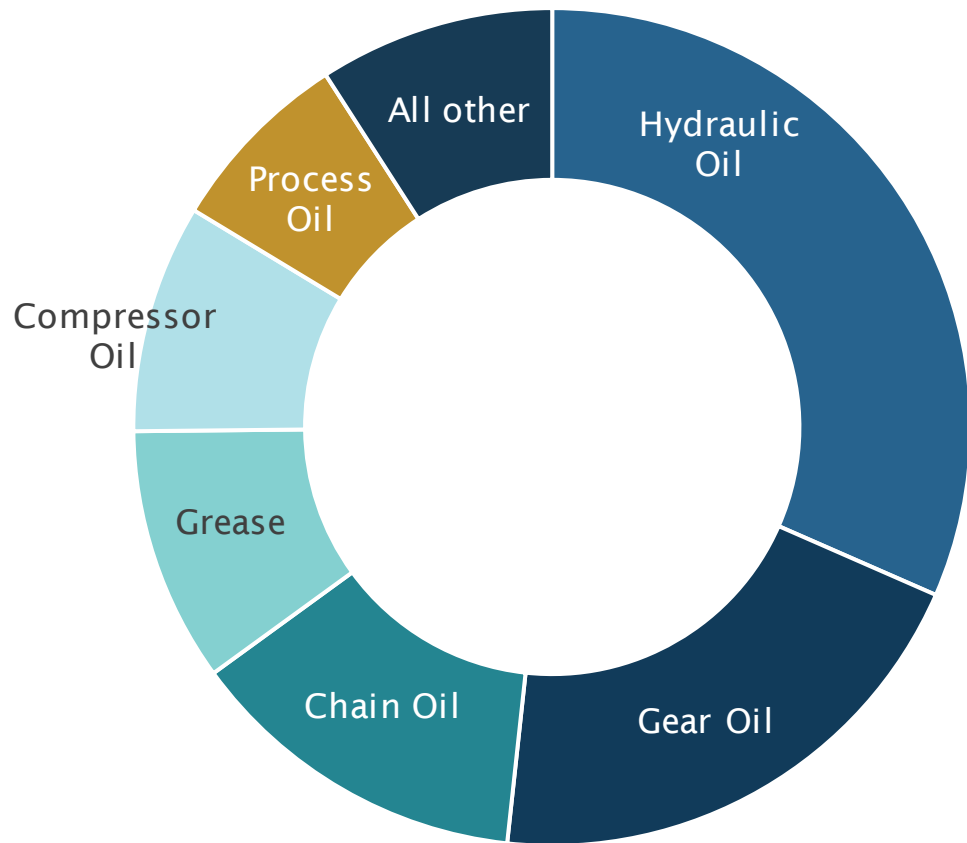
DEMAND FOR FOOD-GRADE LUBRICANTS IN SELECT COUNTRIES BY NSF CLASSIFICATION, 2020



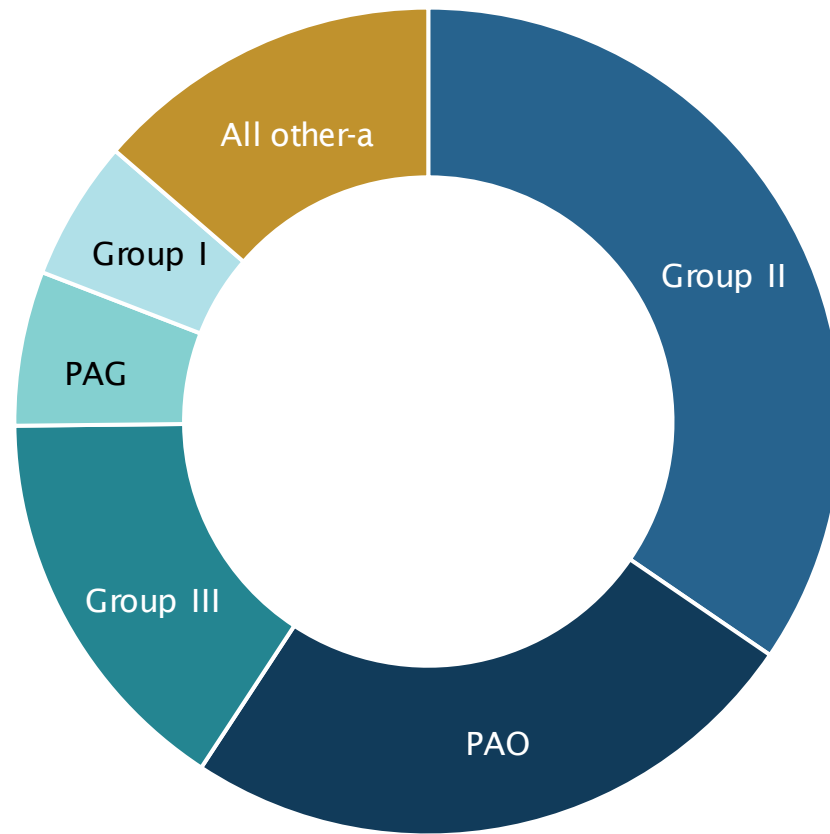
Total: 100-150 Kilotonnes

Food-Grade Lubricants by Lubricant and Basestock Type and Application in 2020

DEMAND FOR FOOD-GRADE LUBRICANTS IN SELECT COUNTRIES BY LUBRICANT TYPE, 2020



DEMAND FOR FOOD-GRADE LUBRICANTS IN SELECT COUNTRIES BY BASESTOCK TYPE, 2020



Total: 100–150 Kilotonnes

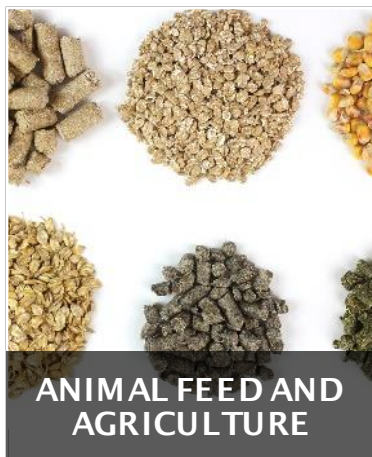
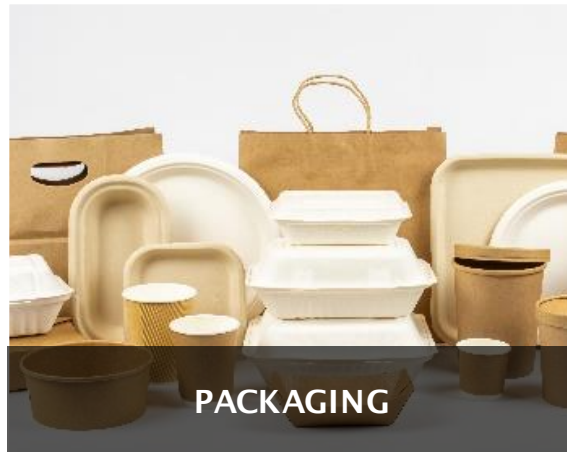
NOTE

"All other" products include release agent, bearing oil, refrigeration oil, heat transfer fluid, vacuum pump oil, and white oil, among others.

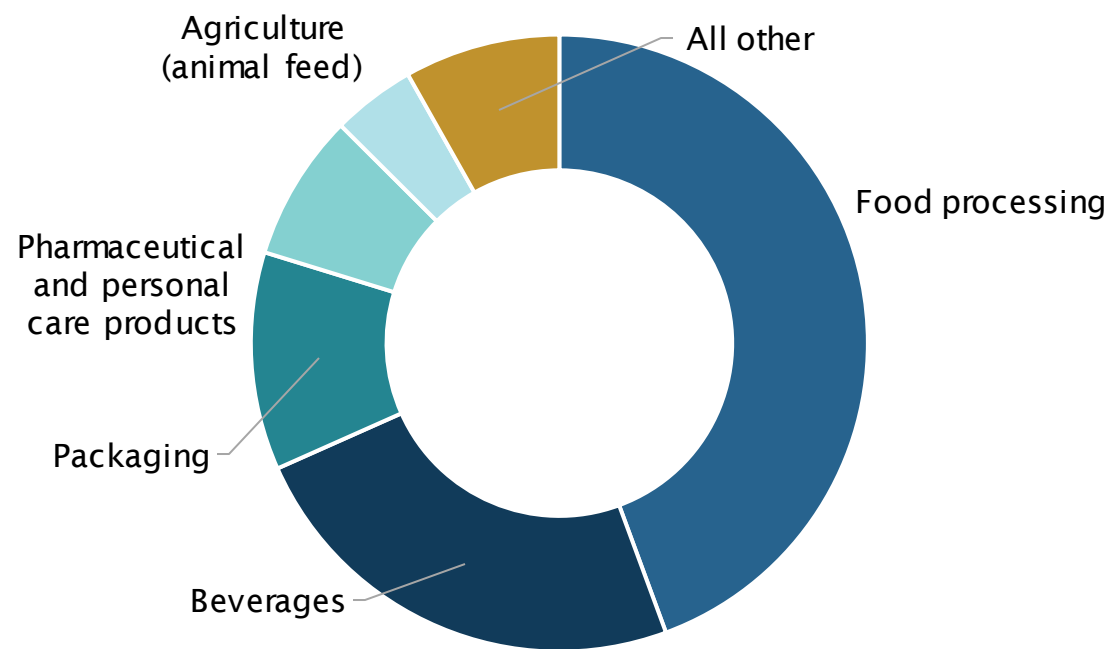
"All other" basestocks include bio-derived, esters, polyisobutylene, and silicones, among others.

Food-Grade Lubricants Applications

Food-grade lubricants are used across various end-use industries, such as food processing, beverages manufacturing, pharmaceuticals, cosmetics, and packaging.



DEMAND FOR FOOD-GRADE LUBRICANTS IN SELECT COUNTRIES BY APPLICATION, 2020

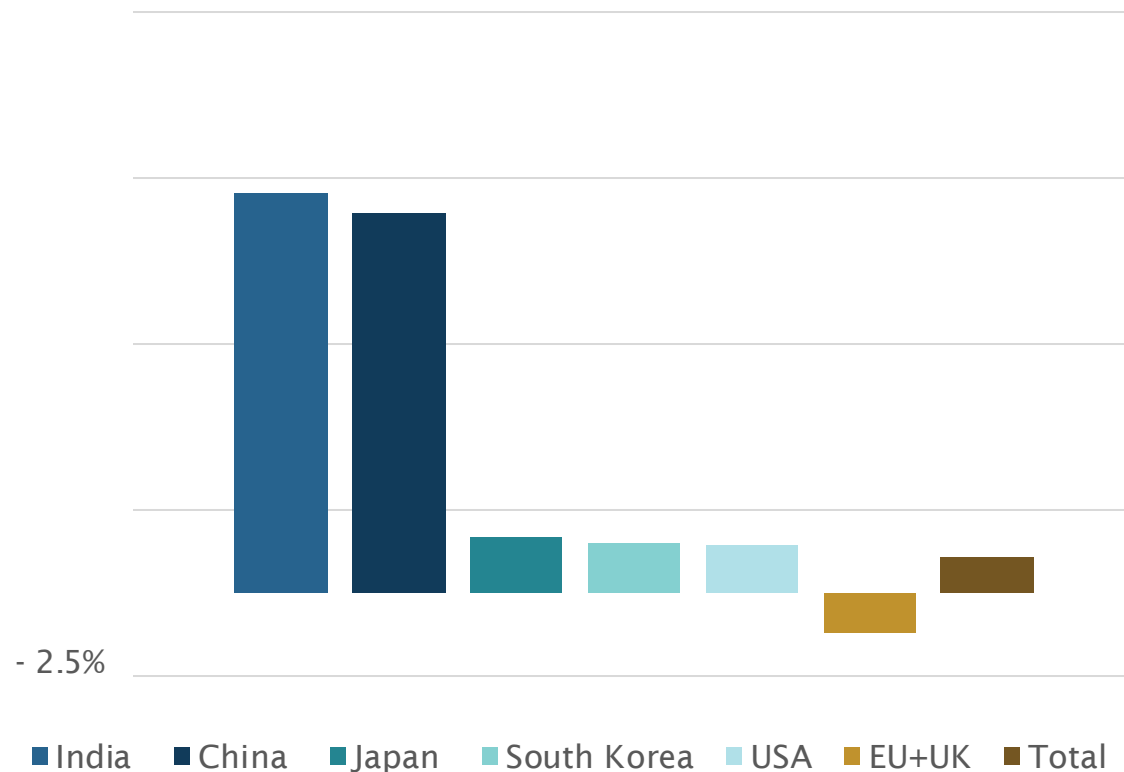


All other applications include cleaning equipment, filling equipment, packaging equipment, food machinery manufacturing, and food-grade lubricant blending, among others. The all-other segment also includes animal feed manufacturing in all regions except the European Union and the United Kingdom.

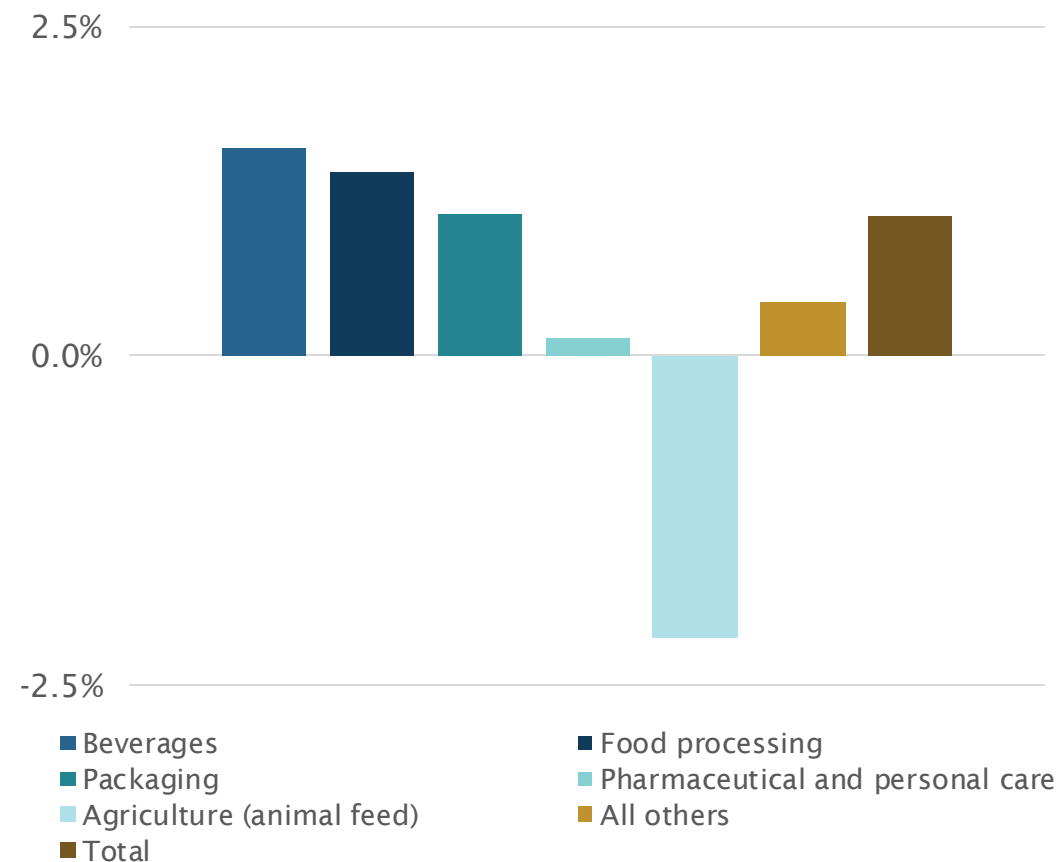
➤ Impact of COVID-19

Overall, the outbreak of the pandemic did not have a severe negative impact on food-grade lubricants consumption.

CHANGE IN FOOD-GRADE LUBRICANT DEMAND IN 2020 COMPARED TO 2019 BY COUNTRY



CHANGE IN FOOD-GRADE LUBRICANT DEMAND IN 2020 COMPARED TO 2019 BY APPLICATION



NOTE

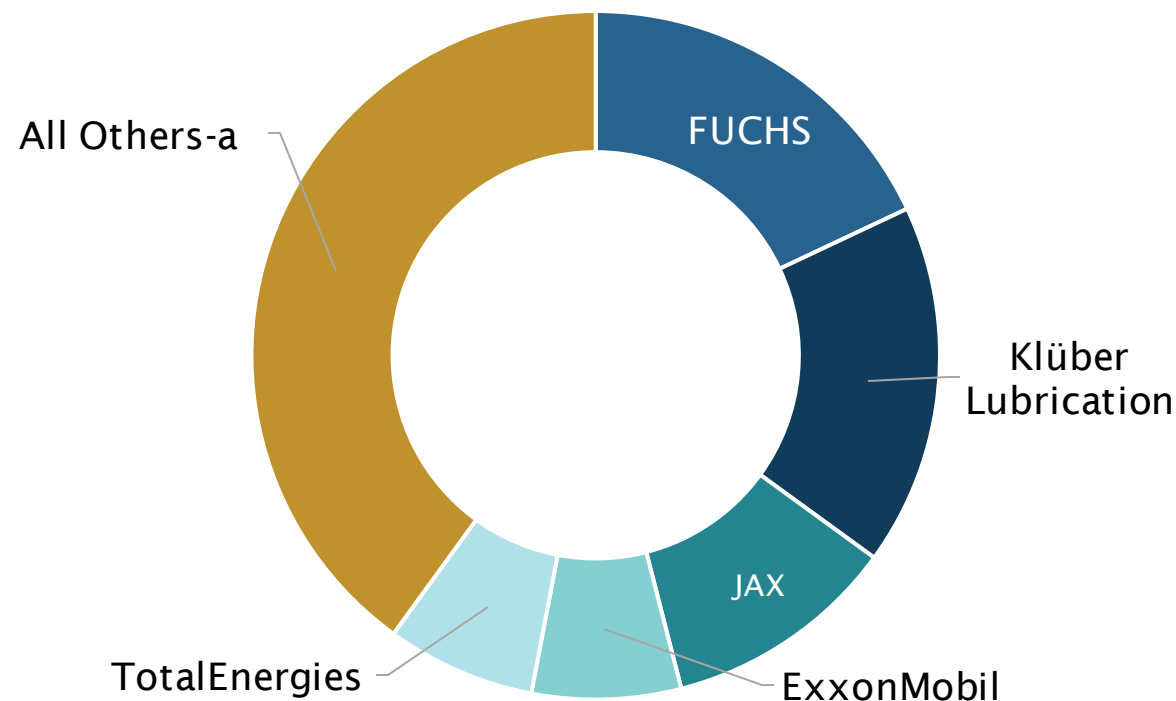
Agriculture (animal feed) is included only in the European Union and the United Kingdom.

"All other" applications include cleaning equipment, filling equipment, packaging equipment, food machinery manufacturing, and food-grade lubricant blending, among others. The segment also includes animal feed manufacturing in all regions except the European Union and the United Kingdom.

Major Suppliers

- Food-grade lubricants is a consolidated market led by the top five players accounting for over 60% of the total market share
- The market has a larger number of small local or region-specific players across various countries.
- Oil majors do not actively participate in this market due to small quantities involved compared to other industrial lubricants

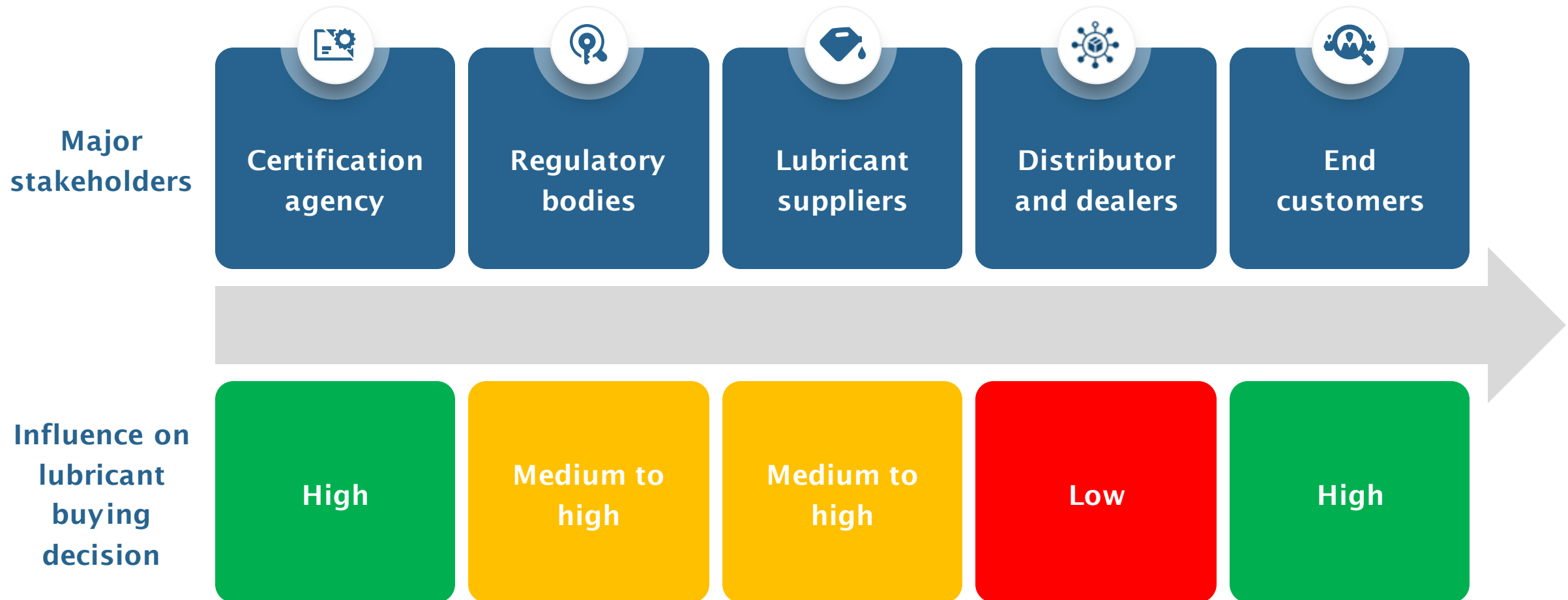
SHARES OF DIFFERENT SUPPLIERS IN FOOD-GRADE LUBRICANT MARKETS OF SELECT COUNTRIES, 2020



Total: 100-150 Kilotonnes

All other suppliers include small local or region-specific suppliers and national oil companies.

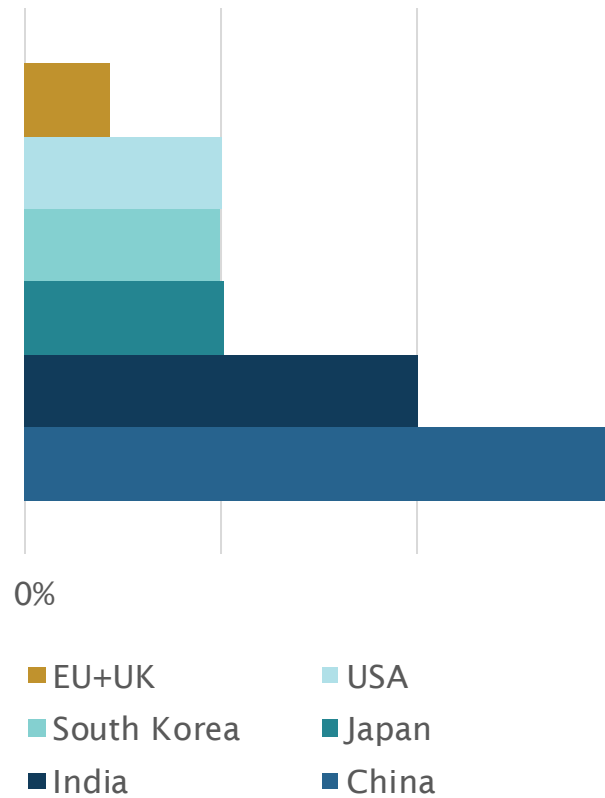
➤ Food-Grade Lubricants Market: Value Chain



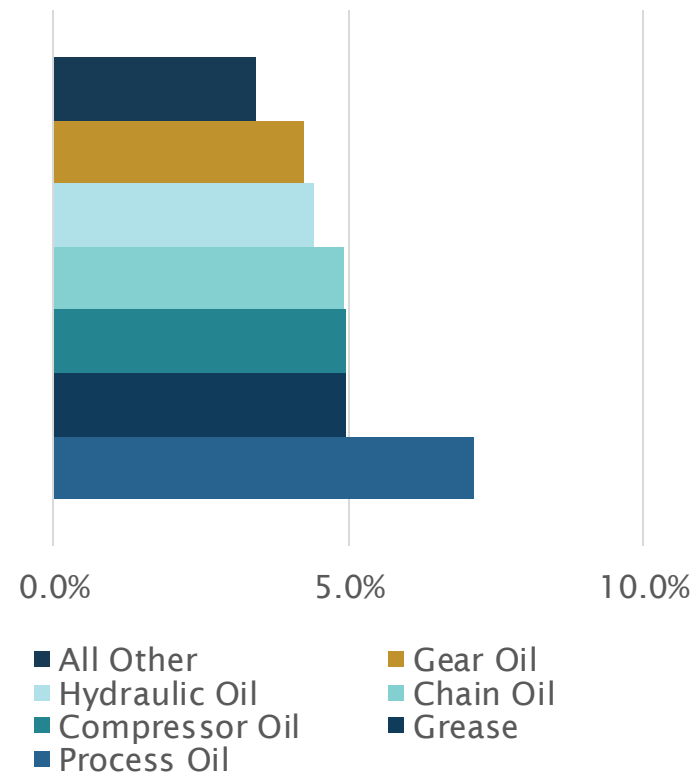
Food-Grade Lubricants Demand Forecast

CAGR, 2020 TO 2025: 4-5%

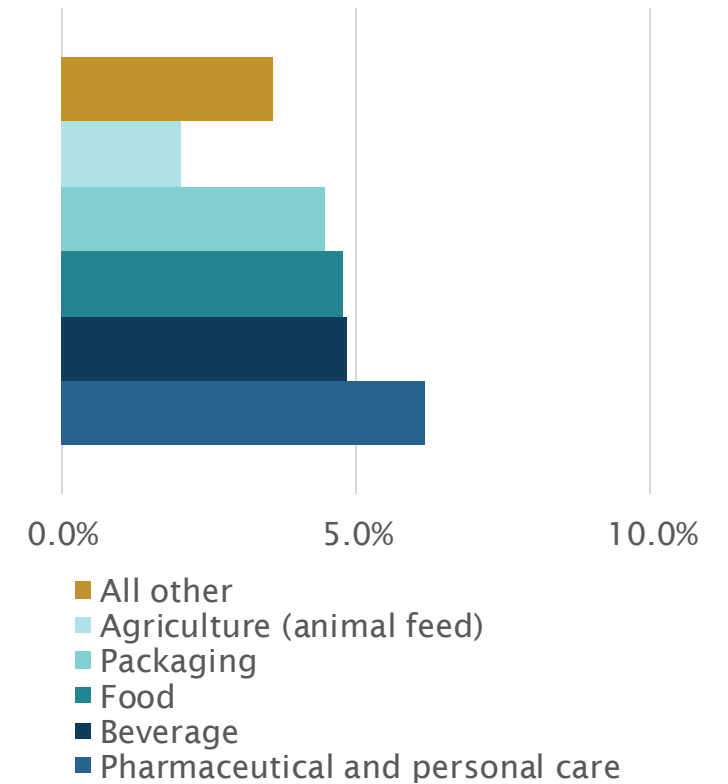
FOOD-GRADE LUBRICANT
DEMAND OUTLOOK BY REGION,
2020 TO 2025



FOOD-GRADE LUBRICANTS
DEMAND OUTLOOK IN SELECT
COUNTRIES BY PRODUCT TYPE,
2020 TO 2025



FOOD-GRADE LUBRICANT
DEMAND OUTLOOK IN SELECT
COUNTRIES BY APPLICATION,
2020 TO 2025



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"All other" applications include cleaning equipment, filling equipment, packaging equipment, food machinery manufacturing, and food-grade lubricant blending, among others. This segment also includes animal feed manufacturing in all regions except the European Union and the United Kingdom.

➤ Market Opportunities and Challenges





Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the agrochemicals, chemicals, materials, energy, life sciences, and consumer products industries for over 60 years.

For more information, visit www.KlineGroup.com.

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