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# Global Bio-based Engine Oil Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Bio-based Engine Oil market size is expected to reach $ 2151 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of bio-based engine oil was approximately 340,000 metric tons, with a global average market price of around $4,500 per ton. That year, total global production capacity reached approximately 450,000 metric tons, and the industry's average gross profit margin stood at about 30%. Bio-based engine oil refers to a finished lubricant—used for engine lubrication, cooling, cleaning, sealing, and corrosion prevention—in which the base oil and additives are derived wholly or partially from renewable resources such as vegetable oils, waste cooking oils, animal fats, or agricultural and forestry biomass. The base oils typically undergo modification processes—such as hydro-refining, esterification, transesterification, or polymerization—and are then formulated with additives such as detergents, dispersants, anti-wear agents, antioxidants, and viscosity index improvers. Bio-based engine oil is distinct from biodiesel; the former is a lubricant, while the latter is a fuel. Furthermore, the term "bio-based" does not necessarily imply 100% biological origin or rapid biodegradability; assessments must be based on bio-based content, degradation performance, and certifications from the API, ACEA, and original equipment manufacturers (OEMs).

The upstream supply chain primarily encompasses the cultivation and crushing of oil crops, the recovery of waste oils and fats, the processing of agricultural and forestry biomass, and the supply of raw materials such as bio-based fatty acids, alcohols, olefins, and additives. Representative raw materials include high-oleic rapeseed oil, soybean oil, sunflower oil, castor oil, waste cooking oil, and certain animal fats. Competition in the upstream sector focuses not only on raw material costs but also on

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supply stability, traceability, carbon footprint, and the control of impurities such as sulfur, phosphorus, metal ions, and moisture. Since the composition of natural oils and fats varies between batches, pretreatment processes—such as degumming, deacidification, decolorization, distillation, or hydrogenation—are usually required. Midstream enterprises first convert biomass raw materials into bio-based synthetic esters, ester polymers, or renewable hydrocarbon base oils; they then formulate, precisely filter, test, and package the products according to the operating conditions of gasoline, diesel, and hybrid engines. Core technical challenges involve simultaneously addressing issues inherent to natural oils—such as poor oxidative stability, poor low-temperature fluidity, and susceptibility to hydrolysis—while also managing volatility loss, carbon deposit control, seal material compatibility, and oil change intervals. Currently, products blending bio-based base oils with mineral oils, synthetic oils, or regenerated base oils are the most common on the market; the final products must still meet relevant SAE viscosity grades, API or ACEA performance standards, and OEM specifications. Companies have already launched lubricants for passenger vehicles, commercial vehicles, and agricultural machinery produced using renewable or recycled base oils. Downstream bio-based engine oils are primarily used in passenger vehicles, commercial vehicles, agricultural and forestry machinery, construction machinery, marine engines, generators, and other small internal combustion engines; they are sold through channels including automaker factory-fill, fleet procurement, maintenance service stations, distributors, and retail outlets.

The development of bio-based engine oils is primarily driven by low-carbon policies, green procurement initiatives, and the need to find alternatives to petroleum-based resources. The USDA’s BioPreferred program has incorporated engine crankcase oils into its bio-based product procurement system and established minimum bio-based content requirements, thereby providing a regulatory framework for procurement by government agencies and public vehicle fleets. Meanwhile, as automakers, logistics fleets, agricultural machinery manufacturers, and industrial users set supply chain decarbonization targets, lubricant companies are increasingly utilizing feedstocks such as synthetic esters derived from vegetable oils and renewable hydrocarbon base oils made from waste fats and oils to reduce reliance on fossil-based base oils.

Furthermore, advancements in base oil modification and formulation technologies are enhancing the overall performance of bio-based engine oils. While traditional vegetable oils suffer from issues such as poor oxidative stability, inadequate low-temperature fluidity, and susceptibility to hydrolysis, processes like hydrotreating, esterification, and ester polymer synthesis—combined with the use of high-oleic feedstocks—enable bio-based base oils to meet stringent requirements for high-temperature oxidation

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resistance, low volatility, anti-wear properties, and extended oil-drain intervals.

In terms of market application, the industry will focus on "partial bio-based" formulations rather than the complete replacement of petroleum-derived components in the near term. Companies typically blend bio-based base oils with synthetic and mineral base oils and high-performance additives to balance costs while complying with API, ACEA, and OEM technical specifications. The product portfolio is expanding to include low-viscosity passenger car engine oils, oils specifically designed for hybrid vehicles, heavy-duty diesel engine oils, and lubricants for agricultural and forestry machinery; additionally, metrics such as bio-based content verification, product carbon footprints, feedstock traceability, and sustainability certifications are increasingly becoming key factors in market competition.

## Report Scope

This report studies the global Bio-based Engine Oil production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Bio-based Engine Oil and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Bio-based Engine Oil that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Bio-based Engine Oil total production and demand, 2021-2032, (Tons)

Global Bio-based Engine Oil total production value, 2021-2032, (USD Million)

Global Bio-based Engine Oil production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Bio-based Engine Oil consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Bio-based Engine Oil domestic production, consumption, key

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domestic manufacturers and share

Global Bio-based Engine Oil production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Bio-based Engine Oil production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Bio-based Engine Oil production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Bio-based Engine Oil market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Castrol, GS Caltex, Cosmo Oil Lubricants, Shell, Renewable Lubricants, Putoline, Eurol, Evolve Lubricants, Nanjing Yueyou Biotechnology, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Bio-based Engine Oil market

## Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Bio-based Engine Oil Market, By Region:

United States

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China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Bio-based Engine Oil Market, Segmentation by Type:

Natural Vegetable Oil type

Bio-based Synthetic Ester type

Bio-based Hydrocarbon Base Oil type

Bio-based Composite type

### Global Bio-based Engine Oil Market, Segmentation by Bio-based Content:

25%–50%

50%–80%

Above 80%

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## Global Bio-based Engine Oil Market, Segmentation by Base Oil Formulation:

Bio-based/Mineral Oil Blend

Bio-based Semi-synthetic

Bio-based Fully Synthetic

High-performance Bio-based Ester

## Global Bio-based Engine Oil Market, Segmentation by SAE Viscosity Grade:

Low Viscosity

Medium Viscosity

High Viscosity

## Global Bio-based Engine Oil Market, Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

# Companies Profiled:

Castrol

GS Caltex

Cosmo Oil Lubricants

Shell

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Renewable Lubricants

Putoline

Eurol

Evolve Lubricants

Nanjing Yueyou Biotechnology

## Key Questions Answered

1. How big is the global Bio-based Engine Oil market?
2. What is the demand of the global Bio-based Engine Oil market?
3. What is the year over year growth of the global Bio-based Engine Oil market?
4. What is the total value of the global Bio-based Engine Oil market?
5. Who are the Major Players in the global Bio-based Engine Oil market?
6. What are the growth factors driving the market demand?

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