

# Global Natural Ester Transformer Oil Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G91D98DF875BEN.html>

Date: February 2026

Pages: 116

Price: US\$ 4,480.00 (Single User License)

ID: G91D98DF875BEN

## Abstracts

The global Natural Ester Transformer Oil market size is expected to reach \$ 338 million by 2032, rising at a market growth of 8.1% CAGR during the forecast period (2026-2032).

In 2025, global Natural Ester Transformer Oil production reached approximately 137 K tons, with an average global market price of around US\$ 1375 per ton.

Natural ester transformer oil is an insulating and cooling medium made from vegetable oils (such as soybean oil, rapeseed oil, and sunflower oil) as a base material. It is primarily used in power transformers and other electrical equipment as a replacement for traditional mineral oil. Its core function is to provide electrical insulation, heat dissipation and cooling, and protection for internal insulation materials during transformer operation, while also offering higher environmental friendliness and safety.

Compared to mineral oil, natural ester transformer oil is renewable, biodegradable, has a high flash point and ignition point, and a low fire risk. It also exhibits better water tolerance and aging inhibition capabilities for transformer paper insulation. Therefore, it is widely used in urban distribution transformers, wind power and photovoltaic step-up substations, indoor or densely populated substations, and power grid projects with high environmental protection requirements.

The demand growth for natural ester transformer oil is primarily driven by two scenarios: first, applications with stricter fire safety and environmental constraints (such as urban centers, underground/indoor substations, hospitals, and data centers), where natural esters are more readily accepted due to their higher fire safety rating (K-class) and biodegradability; second, the increased demand for new and upgraded distribution and

step-up transformers brought about by grid expansion and upgrades, as well as renewable energy grid integration, has led to a rise in the weighting of insulating fluids with 'safer and lower environmental liability risks' in bidding processes. Industry research generally indicates that while mineral oil remains the mainstream, bio-based esters (including natural esters) are growing faster and their penetration rate continues to rise in scenarios with high fire safety and environmental protection requirements.

The trend on the supply and product side is expanding from 'new installation application' to 'in-service retrofitting' and new paths are emerging in terms of sustainability: for example, companies are launching recycled/recyclable ester-based insulating liquids to reduce the carbon footprint throughout the entire life cycle and alleviate the pressure of waste liquid disposal; at the same time, they are continuously iterating on formulations, inhibitor systems and online monitoring around the shortcomings of natural esters (such as low-temperature viscosity, anti-oxidation and life management), driving its expansion from the power distribution end to higher voltage levels and more stringent operating conditions.

This report studies the global Natural Ester Transformer Oil production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Natural Ester Transformer 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 Natural Ester Transformer Oil that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Natural Ester Transformer Oil total production and demand, 2021-2032, (Tons)

Global Natural Ester Transformer Oil total production value, 2021-2032, (USD Million)

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

Global Natural Ester Transformer Oil consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Natural Ester Transformer Oil domestic production, consumption, key domestic manufacturers and share

Global Natural Ester Transformer Oil production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Natural Ester Transformer Oil production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Natural Ester Transformer Oil production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Natural Ester Transformer 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 Cargill, Midel, Meiden, DONGNAM Petroleum, Repsol, M&I Materials, Nynas, Gandhar Oil, Savita, TotalEnergies, 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 Natural Ester Transformer 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 Natural Ester Transformer Oil Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Natural Ester Transformer Oil Market, Segmentation by Type:

Inhibited Natural Ester Oil

Uninhibited Natural Ester Oil

Global Natural Ester Transformer Oil Market, Segmentation by Feedstock:

Soybean Oil Based

Rapeseed / Canola Oil Based

Sunflower Oil Based

Others

Global Natural Ester Transformer Oil Market, Segmentation by Transformer:

Open-type Transformer

Sealed Transformer

Global Natural Ester Transformer Oil Market, Segmentation by Application:

Ordinary Transformer

EHV Transformer

Companies Profiled:

Cargill

Midel

Meiden

DONGNAM Petroleum

Repsol

M&I Materials

Nynas

Gandhar Oil

Savita

TotalEnergies

Shell

Sinopec

Prolec GE International

Archer Daniels Midland

### **Key Questions Answered:**

1. How big is the global Natural Ester Transformer Oil market?
2. What is the demand of the global Natural Ester Transformer Oil market?
3. What is the year over year growth of the global Natural Ester Transformer Oil market?
4. What is the production and production value of the global Natural Ester Transformer Oil market?
5. Who are the key producers in the global Natural Ester Transformer Oil market?
6. What are the growth factors driving the market demand?

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