

Global White Oil for Vaccine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global White Oil for Vaccine market size is expected to reach \$ 288 million by 2032, rising at a market growth of 4.2% CAGR during the forecast period (2026-2032).

In 2025, global White Oil for Vaccine production reached approximately 68 k tons, with an average global market price of around US\$3,082 per ton. White oils are highly refined mineral oils consisting of highly non-polar paraffinic hydrocarbons. Due to their colourless, odourless, tasteless and hydrophobic properties, these products are used in many different industries with the cosmetics, pharmaceuticals, chemistry and plastics and rubber industries leading the field in usage. White oil is mainly divided into five categories: crude white oil, industrial white oil, cosmetic grade white oil, food grade white oil and pharmaceutical grade white oil. The last three categories are collectively referred to as high-end white oil.

White oil for vaccines is pharmaceutical grade white oil and is an indispensable auxiliary material for animal vaccines. It is mainly used in the production of inactivated vaccines and needs to meet pharmaceutical grade standards. It has extremely high requirements on the content of cycloalkanes, aromatics, alkanes and carbon number composition in the oil, the residual hydrocarbons in the animal body, and stress resistance.

The vaccine white oil market is shaped by three primary forces: demand from the global livestock industry, the scale of vaccine production, and evolving regulatory frameworks. The global livestock vaccine market has maintained steady growth, with inactivated vaccines remaining the dominant platform for controlling major animal diseases such as avian influenza and foot and mouth disease. Mineral oil adjuvants, valued for their cost-effectiveness and reliable immunogenicity, account for the vast majority of adjuvant usage in veterinary inactivated vaccines, providing a stable and expanding

end-market for vaccine white oil. On the supply side, production capacity has been historically concentrated among a small number of enterprises in North America and Europe. In recent years, however, China has built the country's largest high-grade white oil production base, with a product portfolio covering the vaccine sector and achieving import substitution at commercial scale. This shift signals a transition in the global competitive landscape from oligopoly toward multi-polar supply, with indigenous capacity in emerging markets strengthening significantly. From a regulatory perspective, quality standards for animal vaccines and their adjuvants continue to tighten across major jurisdictions. The U.S. FDA and USDA formalized the division of oversight for animal biologicals in late 2024, while the European Medicines Agency has maintained targeted review and guideline updates for adjuvanted veterinary vaccines. Rising regulatory requirements raise the technical threshold for producers and increasingly direct demand toward pharmaceutical-grade, high-purity product specifications. In summary, the vaccine white oil market demonstrates a pattern of demand-supply mutual reinforcement and technology-standards-driven industrial upgrading, with sustainable growth resilience.

This report studies the global White Oil for Vaccine production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global White Oil for Vaccine total production and demand, 2021-2032, (Tons)

Global White Oil for Vaccine total production value, 2021-2032, (USD Million)

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

Global White Oil for Vaccine consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: White Oil for Vaccine domestic production, consumption, key domestic manufacturers and share

Global White Oil for Vaccine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global White Oil for Vaccine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global White Oil for Vaccine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global White Oil for Vaccine 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 Shell, Exxon Mobil, TotalEnergies, SEPPIC, SEOJIN CHEM, Sonneborn, Penreco, Gandhar Oil, CNOOC Taizhou Petrochemical, PetroChina Karamay Petrochemical, 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 White Oil for Vaccine 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 White Oil for Vaccine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global White Oil for Vaccine Market, Segmentation by Type:

Low Viscosity Type

Ordinary Type

Global White Oil for Vaccine Market, Segmentation by Chemical Structure:

Naphthenic White Oil

Paraffinic (Alkane) White Oil

Global White Oil for Vaccine Market, Segmentation by Emulsifier:

Water-in-Oil (W/O) Type

Oil-in-Water (O/W) Type

Global White Oil for Vaccine Market, Segmentation by Application:

Swine Vaccines

Poultry Vaccines

Ruminant Vaccines

Others

Companies Profiled:

Shell

Exxon Mobil

TotalEnergies

SEPPIC

SEOJIN CHEM

Sonneborn

Penreco

Gandhar Oil

CNOOC Taizhou Petrochemical

PetroChina Karamay Petrochemical

Zhejiang CHXIN

Key Questions Answered:

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

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