

Transformer Oil Market by Oil Type (Mineral (Naphthenic, Paraffinic), Silicone, Bio-based), Application (Transformer, Switchgear, Reactor), End-User (Transmission & Distribution, Power Generation, Railways & Metros), Region - Global Forecast to 2030

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Abstracts

The global transformer oil market is estimated to grow from USD 2.0 Billion in 2023 to USD 3.0 Billion by 2030; it is expected to record a CAGR of 5.9% during the forecast period. The growth of the transformer oil market is attributed to the strengthening of electric grids in developing economies along with the modernization of electric grids in developed economies due to growing industrialization and urbanization.

“Mineral Oil: The largest segment of the transformer oil market, by oil type “

Based on oil type, the transformer oil market has been split into three types: mineral oil, silicone oil, and bio-based oil. Mineral oil is further segmented into naphthenic and paraffinic oil. The growth for mineral oil is owed to its convenient cost and easy availability compared to other transformer oils. Majority of the existing and new transformers manufactured utilizes mineral oil as an insulation fluid which eventually boosts the growth of mineral oil segment in transformer oil market. In addition, mineral oil has good cooling properties which help dissipate heat from transformers core and prevents overheating which drives the growth of the mineral oil segment.

“Transformer segment is expected to be the largest segment based on application”

By application, the transformer oil market has been segmented into transformer, switchgear, and reactor. The increasing number of substations due to increased demand for power generation in developing countries is one the primary factors driving

the growth of the transformer segment. Transformers cater to various industries such as power generation, railways & metros, power utilities, and others to provide a consistent and reliable power supply, boosting the growth of the segment in the transformer oil market. During the forecast period, Asia Pacific is estimated to lead the transformer oil market within the transformer application segment.

“By end-user, the transmission and distribution segment is expected to lead the market during the forecast period.”

Based on end-user, the transformer oil market is segmented into transmission and distribution, power generation, railways & metros, and others during the forecast period. The transmission and distribution segment is expected to lead the transformer oil market during the forecast period owing to the significant investment in expanding and modernizing the transmission and distribution network to accommodate the growing electricity demand. Expanding the T&D network would create demand for transformer oils as they would be integrated into the power transformers for cooling and insulations, eventually propelling the market growth for transformer oils.

North America is expected to be the second-largest region in the transformer oil market

North America is expected to be the second-largest transformer oil market during the forecast period. Growing demand for reliable power and investments in the T&D sector for upgrading the aging infrastructure will enhance the requirement for transformers, which is expected to boost the demand for transformer oil in North America. Moreover, the expansion of Canada's transmission network plays a crucial role in the growth of transformer oil market. Hence, increasing investments toward expanding and upgrading power grid infrastructure is expected to provide ample opportunities for the providers of transformer oils in the region.

Breakdown of Primaries:

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information and assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 55%, Tier 2- 25%, and Tier 3- 20%

By Designation: C-Level- 35%, Director Levels- 30%, and Others- 35%

By Region: Europe- 35%, North America- 25%, Asia-Pacific 25%, RoW-15%

Note: Others include sales managers, engineers, and regional managers.

Note: The tiers of the companies are defined on the basis of their total revenues as of 2022. Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3: The transformer oil market is dominated by a few major players that have a wide regional presence. The leading players in the transformer oil market are Nynas AB (Sweden), Ergon, Inc. (US), PetroChina Company Limited (China), Shell (UK), APAR Industries Limited (India), and Calumet Specialty Products Partners, L.P. (US). The major strategy adopted by the players includes new product launches and, investments & expansions.

Research Coverage:

The report defines, describes, and forecasts the global transformer oil market by oil type, end-user, application, and region. It also offers a detailed qualitative and quantitative analysis of the market. The report comprehensively reviews the major market drivers, restraints, opportunities, and challenges. It also covers various important aspects of the market. These include an analysis of the competitive landscape, market dynamics, market estimates in terms of value, and future trends in the transformer oil market.

Key Benefits of Buying the Report

Increasing investments in the modernization of power grid projects owing to increasing demand for electricity is the main factor driving the transformer oil market. Environmental concerns associated with adopting mineral oil due to its non-biodegradable characteristics in transformer oils still restrain the market. The replacement of aging grid infrastructure and increased demand for bio-based transformer oil due to growing environmental concerns, especially in the Asia Pacific, provides opportunities for the transformer oil market to grow. However, transformer oil is the refined and processed product of crude oil, and fluctuations in crude oil prices pose major challenges in the transformer oil market.

Product Development/ Innovation: The transformer oil market is witnessing significant product development and innovation, driven by the growing demand

for renewable energy. Companies are investing in developing advanced transformer oils such as bio-based oil specifically designed to reduce the carbon emissions from grid infrastructure and promote renewable energy sources. These oils are bio-degradable and are majorly composed of vegetable oils and antioxidant additives to enhance the operational efficiency of transformers and reduce environmental impact.

Market Development: Renewable energy sources are becoming increasingly important in the power grid infrastructure. Renewables include sources such as solar, wind, hydro, geothermal, and biomass, among others. This has led to the development of solar energy and wind turbine transformers, usually biodegradable oil-filled transformers.

Market Diversification: Ergon, Inc. introduced HyVolt C50A, an Arctic grade transformer oil designed to withstand extreme cold weather conditions. The HyVolt C50A offers oxidation stability, high dielectric strength, and cooling properties.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and service offerings of leading players, like include Nynas AB (Sweden), Ergon, Inc. (US), PetroChina Company Limited (China), Shell (UK), APAR Industries Limited (India), and Calumet Specialty Products Partners, L.P. (US) among others in the transformer oil market.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.2.1 TRANSFORMER OIL MARKET, BY END USER: INCLUSIONS & EXCLUSIONS

1.2.2 TRANSFORMER OIL MARKET, BY APPLICATION: INCLUSIONS & EXCLUSIONS

1.3 MARKET SCOPE

1.3.1 MARKETS COVERED

1.3.2 REGIONAL SCOPE

1.3.3 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

1.5 LIMITATIONS

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

1.8 IMPACT OF RECESSION

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 1 TRANSFORMER OIL MARKET: RESEARCH DESIGN

2.2 MARKET BREAKDOWN & DATA TRIANGULATION

FIGURE 2 DATA TRIANGULATION METHODOLOGY

2.2.1 SECONDARY DATA

2.2.1.1 Key data from secondary sources

2.2.2 PRIMARY DATA

2.2.2.1 Key industry insights

2.2.2.2 Breakdown of primaries

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, & REGION

2.3 MARKET SIZE ESTIMATION

2.3.1 BOTTOM-UP APPROACH

FIGURE 4 MARKET SIZE ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH

2.3.2 TOP-DOWN APPROACH

FIGURE 5 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

2.3.3 DEMAND-SIDE ANALYSIS

FIGURE 6 MAIN METRICS CONSIDERED WHILE CONSTRUCTING AND

Transformer Oil Market by Oil Type (Mineral (Naphthenic, Paraffinic), Silicone, Bio-based), Application (Trans...

ASSESSING DEMAND FOR TRANSFORMER OIL

2.3.3.1 Calculation for demand side

2.3.3.2 Assumptions for demand-side metrics

2.3.4 SUPPLY-SIDE ANALYSIS

FIGURE 7 KEY STEPS CONSIDERED FOR ASSESSING SUPPLY OF TRANSFORMER OIL

FIGURE 8 TRANSFORMER OIL MARKET: SUPPLY-SIDE ANALYSIS, 2022

2.3.4.1 Calculations for supply side

2.3.4.2 Assumptions for supply-side metrics

FIGURE 9 COMPANY REVENUE ANALYSIS, 2022

2.3.5 FORECAST

2.3.5.1 Impact of recession

3 EXECUTIVE SUMMARY

TABLE 1 TRANSFORMER OIL MARKET SNAPSHOT

FIGURE 10 MINERAL OIL SEGMENT TO DOMINATE TRANSFORMER OIL MARKET DURING FORECAST PERIOD

FIGURE 11 TRANSFORMER SEGMENT TO LEAD TRANSFORMER OIL MARKET DURING FORECAST PERIOD

FIGURE 12 TRANSMISSION & DISTRIBUTION UTILITIES SEGMENT TO LEAD TRANSFORMER OIL MARKET DURING FORECAST PERIOD

FIGURE 13 ASIA PACIFIC DOMINATED TRANSFORMER OIL MARKET IN 2022

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN TRANSFORMER OIL MARKET

FIGURE 14 GROWING DEMAND FOR BIO-BASED TRANSFORMER OIL DUE TO ENVIRONMENTAL CONCERNS TO DRIVE MARKET DURING 2023–2030

4.2 TRANSFORMER OIL MARKET, BY REGION

FIGURE 15 TRANSFORMER OIL MARKET IN ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

4.3 TRANSFORMER OIL MARKET, BY OIL TYPE

FIGURE 16 MINERAL OIL SEGMENT DOMINATED TRANSFORMER OIL MARKET IN 2022

4.4 TRANSFORMER OIL MARKET, BY APPLICATION

FIGURE 17 TRANSFORMER SEGMENT ACCOUNTED FOR LARGEST MARKET SHARE IN 2022

4.5 TRANSFORMER OIL MARKET, BY END USER

FIGURE 18 TRANSMISSION & DISTRIBUTION UTILITIES SEGMENT CAPTURED LARGEST SHARE OF TRANSFORMER OIL MARKET IN 2022

4.6 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY OIL TYPE & COUNTRY

FIGURE 19 MINERAL OIL AND CHINA HELD LARGEST SHARES OF TRANSFORMER OIL MARKET IN ASIA PACIFIC IN 2022

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 20 TRANSFORMER OIL MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Expansion of electric grid network in Asia Pacific

FIGURE 21 GLOBAL T&D INVESTMENT PROJECTION, 2020–2040

5.2.1.2 Modernization of electric grids and adoption of smart grids in developed economies

5.2.2 RESTRAINTS

5.2.2.1 Environmental concerns over use of mineral transformer oil

5.2.2.2 Increasing demand for dry-type transformers

5.2.2.3 Competition from players in unorganized sector

5.2.3 OPPORTUNITIES

5.2.3.1 Growing demand for bio-based transformer oil due to environmental concerns

5.2.3.2 Increase in cross-border electricity trade

5.2.3.3 Increasing investments in HVDC transmission systems

5.2.4 CHALLENGES

5.2.4.1 Constant fluctuations in crude oil prices

FIGURE 22 WEST TEXAS INTERMEDIATE (WTI) CRUDE OIL PRICES, JANUARY 2018–MARCH 2023

5.3 IMPACT OF DEVELOPMENTS IN RENEWABLE ENERGY & TRANSITION TOWARD CLEAN ENERGY ON TRANSFORMER OIL MARKET

5.4 IMPACT OF EV ADOPTION & EV INFRASTRUCTURE DEVELOPMENTS ON TRANSFORMER OIL MARKET

FIGURE 23 GLOBAL EV SALES VOLUME, 2021–2022

5.5 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

5.5.1 REVENUE SHIFTS & NEW REVENUE POCKETS IN TRANSFORMER OIL MARKET

FIGURE 24 REVENUE SHIFTS FOR TRANSFORMER OIL PROVIDERS

5.6 AVERAGE SELLING PRICING ANALYSIS

5.6.1 AVERAGE SELLING PRICING ANALYSIS, BY OIL TYPE

TABLE 2 TRANSFORMER OIL MARKET: PRICING ANALYSIS

5.7 VALUE CHAIN ANALYSIS

FIGURE 25 TRANSFORMER OIL MARKET: VALUE CHAIN ANALYSIS

TABLE 3 TRANSFORMER OIL MARKET: VALUE CHAIN ANALYSIS

5.7.1 RAW MATERIAL SUPPLIERS

5.7.2 TRANSFORMER OIL PRODUCERS

5.7.3 EQUIPMENT MANUFACTURERS

5.7.4 DISTRIBUTORS

5.7.5 END USERS

5.8 MARKET MAP

FIGURE 26 TRANSFORMER OIL: MARKET MAP

5.9 TECHNOLOGY ANALYSIS

TABLE 4 TRANSFORMER OIL MARKET: REGULATIONS

5.10 PORTER'S FIVE FORCES ANALYSIS

FIGURE 27 TRANSFORMER OIL MARKET: PORTER'S FIVE FORCES ANALYSIS

TABLE 5 TRANSFORMER OIL MARKET: PORTER'S FIVE FORCES ANALYSIS

5.10.1 THREAT OF NEW ENTRANTS

5.10.2 BARGAINING POWER OF SUPPLIERS

5.10.3 BARGAINING POWER OF BUYERS

5.10.4 THREAT OF SUBSTITUTES

5.10.5 INTENSITY OF COMPETITIVE RIVALRY

5.11 CASE STUDY ANALYSIS

5.11.1 TATA POWER INSTALLS DISTRIBUTION TRANSFORMERS IN MUMBAI TO ADDRESS SPACE- AND SAFETY-RELATED CONCERNS AND REDUCE COST AND ENVIRONMENTAL IMPACT

6 TRANSFORMER OIL MARKET, BY OIL TYPE

6.1 INTRODUCTION

FIGURE 28 TRANSFORMER OIL MARKET, BY OIL TYPE, 2022 (USD MILLION)

TABLE 6 TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 7 TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 8 TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (MILLION LITERS)

TABLE 9 TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (MILLION LITERS)

6.2 MINERAL OIL

6.2.1 EASY AVAILABILITY AND LOW-PRICE INDEX TO INCREASE DEMAND FOR MINERAL TRANSFORMER OIL

TABLE 10 MINERAL OIL: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE, 2018–2022 (USD MILLION)

TABLE 11 MINERAL OIL: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE, 2023–2030 (USD MILLION)

TABLE 12 MINERAL OIL: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE, 2018–2022 (MILLION LITERS)

TABLE 13 MINERAL OIL: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE, 2023–2030 (MILLION LITERS)

TABLE 14 MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2018–2022 (USD MILLION)

TABLE 15 MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2023–2030 (USD MILLION)

TABLE 16 MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2018–2022 (MILLION LITERS)

TABLE 17 MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2023–2030 (MILLION LITERS)

TABLE 18 MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 19 MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.2.2 NAPHTHENIC OIL

TABLE 20 NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 21 NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.2.2.1 Naphthenic mineral oil, by inhibition type

TABLE 22 NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2018–2022 (USD MILLION)

TABLE 23 NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2023–2030 (USD MILLION)

TABLE 24 NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2018–2022 (MILLION LITERS)

TABLE 25 NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2023–2030 (MILLION LITERS)

6.2.2.1.1 Inhibited naphthenic mineral oil

TABLE 26 INHIBITED NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 27 INHIBITED NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.2.2.1.2 Uninhibited naphthenic mineral oil

TABLE 28 UNINHIBITED NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 29 UNINHIBITED NAPHTHENIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.2.3 PARAFFINIC OIL

TABLE 30 PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 31 PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.2.3.1 Paraffinic mineral oil, by inhibition type

TABLE 32 PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2018–2022 (USD MILLION)

TABLE 33 PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2023–2030 (USD MILLION)

TABLE 34 PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2018–2022 (MILLION LITERS)

TABLE 35 PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY INHIBITION TYPE, 2023–2030 (MILLION LITERS)

6.2.3.1.1 Inhibited paraffinic mineral oil

TABLE 36 INHIBITED PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 37 INHIBITED PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.2.3.1.2 Uninhibited paraffinic mineral oil

TABLE 38 UNINHIBITED PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 39 UNINHIBITED PARAFFINIC MINERAL OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.3 BIO-BASED OIL

6.3.1 RISING ENVIRONMENTAL CONCERNS TO DRIVE DEMAND FOR BIO-BASED OIL

TABLE 40 BIO-BASED OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 41 BIO-BASED OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

6.4 SILICONE OIL

6.4.1 NON-REACTIVE AND NON-TOXIC PROPERTIES TO FUEL NEED FOR SILICONE TRANSFORMER OIL

TABLE 42 SILICONE OIL: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 43 SILICONE OIL: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

7 TRANSFORMER OIL MARKET, BY END USER

7.1 INTRODUCTION

FIGURE 29 TRANSFORMER OIL MARKET, BY END USER, 2022 (USD MILLION)

TABLE 44 TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 45 TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

TABLE 46 TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (MILLION LITERS)

TABLE 47 TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (MILLION LITERS)

7.2 TRANSMISSION & DISTRIBUTION UTILITIES

7.2.1 RISING FOCUS ON UPGRADING AGING T&D INFRASTRUCTURE TO FUEL MARKET GROWTH

TABLE 48 TRANSMISSION & DISTRIBUTION UTILITIES: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 49 TRANSMISSION & DISTRIBUTION UTILITIES: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

7.3 RAILWAYS & METROS

7.3.1 GROWING INVESTMENTS IN RAILWAYS & METROS TO PROPEL DEMAND FOR TRANSFORMER OIL

TABLE 50 RAILWAYS & METROS: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 51 RAILWAYS & METROS: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

7.4 POWER GENERATION UTILITIES

7.4.1 INCREASING NEED FOR POWER GENERATION TO DRIVE MARKET

TABLE 52 POWER GENERATION UTILITIES: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 53 POWER GENERATION UTILITIES: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

7.5 OTHERS

TABLE 54 OTHERS: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 55 OTHERS: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

8 TRANSFORMER OIL MARKET, BY APPLICATION

8.1 INTRODUCTION

FIGURE 30 TRANSFORMER OIL MARKET, BY APPLICATION, 2022 (USD MILLION)

TABLE 56 TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 57 TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 58 TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (MILLION LITERS)

TABLE 59 TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (MILLION LITERS)

8.2 TRANSFORMER

8.2.1 INCREASING INVESTMENTS IN T&D SECTOR TO CREATE DEMAND FOR TRANSFORMERS

TABLE 60 TRANSFORMER: TRANSFORMER OIL MARKET, BY SUB-APPLICATION, 2018–2022 (USD MILLION)

TABLE 61 TRANSFORMER: TRANSFORMER OIL MARKET, BY SUB-APPLICATION, 2023–2030 (USD MILLION)

TABLE 62 TRANSFORMER: TRANSFORMER OIL MARKET, BY SUB-APPLICATION, 2018–2022 (MILLION LITERS)

TABLE 63 TRANSFORMER: TRANSFORMER OIL MARKET, BY SUB-APPLICATION, 2023–2030 (MILLION LITERS)

TABLE 64 TRANSFORMER: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 65 TRANSFORMER: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

8.2.2 POWER TRANSFORMER

TABLE 66 POWER TRANSFORMER: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 67 POWER TRANSFORMER: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

8.2.3 DISTRIBUTION TRANSFORMER

TABLE 68 DISTRIBUTION TRANSFORMER: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 69 DISTRIBUTION TRANSFORMER: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

8.3 REACTOR

8.3.1 LONG-TERM INDUSTRIAL GROWTH AND INCREASED DEMAND FOR ENERGY TO BOOST SEGMENTAL GROWTH

TABLE 70 REACTOR: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 71 REACTOR: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

8.4 SWITCHGEAR

8.4.1 INVESTMENTS IN T&D NETWORK EXPANSION TO PROPEL DEMAND FOR OIL-FILLED SWITCHGEAR

TABLE 72 SWITCHGEAR: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 73 SWITCHGEAR: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

9 TRANSFORMER OIL MARKET, BY REGION

9.1 INTRODUCTION

FIGURE 31 MARKET IN ASIA PACIFIC TO GROW AT HIGHEST CAGR DURING FORECAST PERIOD

FIGURE 32 TRANSFORMER OIL MARKET SHARE (VALUE), BY REGION, 2022

TABLE 74 TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 75 TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 76 TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (MILLION LITERS)

TABLE 77 TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (MILLION LITERS)

9.2 ASIA PACIFIC

FIGURE 33 ASIA PACIFIC: TRANSFORMER OIL MARKET SNAPSHOT

9.2.1 ASIA PACIFIC: RECESSION IMPACT

9.2.2 BY OIL TYPE

TABLE 78 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 79 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

9.2.2.1 Mineral oil - by sub-oil type

TABLE 80 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 81 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.2.2.2 Mineral oil - by inhibition type

TABLE 82 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 83 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.2.2.2.1 Naphthenic mineral oil - by inhibition type

TABLE 84 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (NAPHTHENIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 85 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (NAPHTHENIC MINERAL OIL), 2023–2030 (USD MILLION)

9.2.2.2.2 Paraffinic mineral oil - by inhibition type

TABLE 86 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (PARAFFINIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 87 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (PARAFFINIC MINERAL OIL), 2023–2030 (USD MILLION)

9.2.3 BY APPLICATION

TABLE 88 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 89 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

9.2.3.1 Transformer - by sub-application

TABLE 90 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 91 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

9.2.4 BY END USER

TABLE 92 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 93 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.2.5 BY COUNTRY

TABLE 94 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 95 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY COUNTRY, 2023–2030

(USD MILLION)

TABLE 96 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY COUNTRY, 2018–2022
(MILLION LITERS)

TABLE 97 ASIA PACIFIC: TRANSFORMER OIL MARKET, BY COUNTRY, 2023–2030
(MILLION LITERS)

9.2.5.1 China

9.2.5.1.1 Increasing investments in T&D sector to favor market growth

TABLE 98 CHINA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD
MILLION)

TABLE 99 CHINA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD
MILLION)

TABLE 100 CHINA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL
OIL), 2018–2022 (USD MILLION)

TABLE 101 CHINA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL
OIL), 2023–2030 (USD MILLION)

TABLE 102 CHINA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022
(USD MILLION)

TABLE 103 CHINA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030
(USD MILLION)

TABLE 104 CHINA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION
(TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 105 CHINA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION
(TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 106 CHINA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD
MILLION)

TABLE 107 CHINA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD
MILLION)

9.2.5.2 India

9.2.5.2.1 Increasing power generation activities to generate demand for transformer
oil

TABLE 108 INDIA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD
MILLION)

TABLE 109 INDIA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD
MILLION)

TABLE 110 INDIA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL
OIL), 2018–2022 (USD MILLION)

TABLE 111 INDIA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL
OIL), 2023–2030 (USD MILLION)

TABLE 112 INDIA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022

(USD MILLION)

TABLE 113 INDIA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030

(USD MILLION)

TABLE 114 INDIA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION

(TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 115 INDIA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION

(TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 116 INDIA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 117 INDIA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.2.5.3 Japan

9.2.5.3.1 Renovation of grid infrastructure to drive market

TABLE 118 JAPAN: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 119 JAPAN: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 120 JAPAN: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 121 JAPAN: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 122 JAPAN: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 123 JAPAN: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 124 JAPAN: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 125 JAPAN: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 126 JAPAN: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 127 JAPAN: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.2.5.4 Australia

9.2.5.4.1 Rising construction and mining activities to spur demand for transformer oil

TABLE 128 AUSTRALIA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 129 AUSTRALIA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 130 AUSTRALIA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 131 AUSTRALIA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 132 AUSTRALIA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 133 AUSTRALIA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 134 AUSTRALIA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 135 AUSTRALIA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 136 AUSTRALIA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 137 AUSTRALIA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.2.5.5 South Korea

9.2.5.5.1 Government initiatives to boost renewable power generation to increase demand for transformer oil

TABLE 138 SOUTH KOREA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 139 SOUTH KOREA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 140 SOUTH KOREA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 141 SOUTH KOREA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 142 SOUTH KOREA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 143 SOUTH KOREA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 144 SOUTH KOREA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 145 SOUTH KOREA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 146 SOUTH KOREA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 147 SOUTH KOREA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.2.5.6 Rest of Asia Pacific

TABLE 148 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 149 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 150 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 151 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 152 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 153 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 154 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 155 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 156 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 157 REST OF ASIA PACIFIC: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.3 NORTH AMERICA

FIGURE 34 NORTH AMERICA: TRANSFORMER OIL MARKET SNAPSHOT

9.3.1 NORTH AMERICA: RECESSION IMPACT

9.3.2 BY OIL TYPE

TABLE 158 NORTH AMERICA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 159 NORTH AMERICA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

9.3.2.1 Mineral oil - by sub-oil type

TABLE 160 NORTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 161 NORTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.3.2.2 Mineral oil - by inhibition type

TABLE 162 NORTH AMERICA: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 163 NORTH AMERICA: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.3.2.2.1 Naphthenic mineral oil - by inhibition type

TABLE 164 NORTH AMERICA: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (NAPHTHENIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 165 NORTH AMERICA: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (NAPHTHENIC MINERAL OIL), 2023–2030 (USD MILLION)

9.3.2.2.2 Paraffinic mineral oil - by inhibition type

TABLE 166 NORTH AMERICA: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (PARAFFINIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 167 NORTH AMERICA: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (PARAFFINIC MINERAL OIL), 2023–2030 (USD MILLION)

9.3.3 BY APPLICATION

TABLE 168 NORTH AMERICA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 169 NORTH AMERICA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

9.3.3.1 Transformer - by sub-application

TABLE 170 NORTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 171 NORTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

9.3.4 BY END USER

TABLE 172 NORTH AMERICA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 173 NORTH AMERICA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.3.5 BY COUNTRY

TABLE 174 NORTH AMERICA: TRANSFORMER OIL MARKET, BY COUNTRY, 2018–2022 (USD MILLION)

TABLE 175 NORTH AMERICA: TRANSFORMER OIL MARKET, BY COUNTRY, 2023–2030 (USD MILLION)

TABLE 176 NORTH AMERICA: TRANSFORMER OIL MARKET, BY COUNTRY, 2018–2022 (MILLION LITERS)

TABLE 177 NORTH AMERICA: TRANSFORMER OIL MARKET, BY COUNTRY, 2023–2030 (MILLION LITERS)

9.3.5.1 US

9.3.5.1.1 Upgrades to existing power infrastructure to drive market

TABLE 178 US: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 179 US: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD

MILLION)

TABLE 180 US: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 181 US: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 182 US: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 183 US: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 184 US: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 185 US: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 186 US: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 187 US: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.3.5.2 Canada

9.3.5.2.1 Expansion of transmission network to propel market

TABLE 188 CANADA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 189 CANADA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 190 CANADA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 191 CANADA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 192 CANADA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 193 CANADA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 194 CANADA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 195 CANADA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 196 CANADA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 197 CANADA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.3.5.3 Mexico

9.3.5.3.1 Growth of industrial sector and surging energy requirements to boost market

TABLE 198 MEXICO: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 199 MEXICO: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 200 MEXICO: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 201 MEXICO: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 202 MEXICO: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 203 MEXICO: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 204 MEXICO: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 205 MEXICO: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 206 MEXICO: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 207 MEXICO: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.4 EUROPE

9.4.1 EUROPE: RECESSION IMPACT

9.4.2 BY OIL TYPE

TABLE 208 EUROPE: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 209 EUROPE: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

9.4.2.1 Mineral oil - by sub-oil type

TABLE 210 EUROPE: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 211 EUROPE: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.4.2.2 Mineral oil - by inhibition type

TABLE 212 EUROPE: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 213 EUROPE: TRANSFORMER OIL MARKET, BY INHIBITION TYPE

(MINERAL OIL), 2023–2030 (USD MILLION)

9.4.2.2.1 Naphthenic mineral oil - by inhibition type

TABLE 214 EUROPE: TRANSFORMER OIL MARKET, BY INHIBITION TYPE
(NAPHTHENIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 215 EUROPE: TRANSFORMER OIL MARKET, BY INHIBITION TYPE
(NAPHTHENIC MINERAL OIL), 2023–2030 (USD MILLION)

9.4.2.2.2 Paraffinic mineral oil - by inhibition type

TABLE 216 EUROPE: TRANSFORMER OIL MARKET, BY INHIBITION TYPE
(PARAFFINIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 217 EUROPE: TRANSFORMER OIL MARKET, BY INHIBITION TYPE
(PARAFFINIC MINERAL OIL), 2023–2030 (USD MILLION)

9.4.3 BY APPLICATION

TABLE 218 EUROPE: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022
(USD MILLION)

TABLE 219 EUROPE: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030
(USD MILLION)

9.4.3.1 Transformer - by sub-application

TABLE 220 EUROPE: TRANSFORMER OIL MARKET, BY SUB-APPLICATION
(TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 221 EUROPE: TRANSFORMER OIL MARKET, BY SUB-APPLICATION
(TRANSFORMER), 2023–2030 (USD MILLION)

9.4.4 BY END USER

TABLE 222 EUROPE: TRANSFORMER OIL MARKET, BY END USER, 2018–2022
(USD MILLION)

TABLE 223 EUROPE: TRANSFORMER OIL MARKET, BY END USER, 2023–2030
(USD MILLION)

9.4.5 BY COUNTRY

TABLE 224 EUROPE: TRANSFORMER OIL MARKET, BY COUNTRY, 2018–2022
(USD MILLION)

TABLE 225 EUROPE: TRANSFORMER OIL MARKET, BY COUNTRY, 2023–2030
(USD MILLION)

TABLE 226 EUROPE: TRANSFORMER OIL MARKET, BY COUNTRY, 2018–2022
(MILLION LITERS)

TABLE 227 EUROPE: TRANSFORMER OIL MARKET, BY COUNTRY, 2023–2030
(MILLION LITERS)

9.4.5.1 UK

9.4.5.1.1 Growing investments in renewables to drive market

TABLE 228 UK: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD
MILLION)

TABLE 229 UK: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 230 UK: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 231 UK: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 232 UK: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 233 UK: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 234 UK: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 235 UK: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 236 UK: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 237 UK: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.4.5.2 Germany

9.4.5.2.1 Expansion of transmission lines to boost demand for transformer oil

TABLE 238 GERMANY: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 239 GERMANY: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 240 GERMANY: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 241 GERMANY: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 242 GERMANY: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 243 GERMANY: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 244 GERMANY: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 245 GERMANY: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 246 GERMANY: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 247 GERMANY: TRANSFORMER OIL MARKET, BY END USER, 2023–2030

(USD MILLION)

9.4.5.3 Russia

9.4.5.3.1 Investments in oil & gas sector and government focus on renewable energy production to augment market growth

TABLE 248 RUSSIA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 249 RUSSIA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 250 RUSSIA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 251 RUSSIA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 252 RUSSIA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 253 RUSSIA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 254 RUSSIA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 255 RUSSIA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 256 RUSSIA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 257 RUSSIA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.4.5.4 France

9.4.5.4.1 Increased adoption of renewable energy to fuel market growth

TABLE 258 FRANCE: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 259 FRANCE: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 260 FRANCE: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 261 FRANCE: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 262 FRANCE: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 263 FRANCE: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 264 FRANCE: TRANSFORMER OIL MARKET, BY SUB-APPLICATION

(TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 265 FRANCE: TRANSFORMER OIL MARKET, BY SUB-APPLICATION

(TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 266 FRANCE: TRANSFORMER OIL MARKET, BY END USER, 2018–2022
(USD MILLION)

TABLE 267 FRANCE: TRANSFORMER OIL MARKET, BY END USER, 2023–2030
(USD MILLION)

9.4.5.5 Rest of Europe

TABLE 268 REST OF EUROPE: TRANSFORMER OIL MARKET, BY OIL TYPE,
2018–2022 (USD MILLION)

TABLE 269 REST OF EUROPE: TRANSFORMER OIL MARKET, BY OIL TYPE,
2023–2030 (USD MILLION)

TABLE 270 REST OF EUROPE: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE
(MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 271 REST OF EUROPE: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE
(MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 272 REST OF EUROPE: TRANSFORMER OIL MARKET, BY APPLICATION,
2018–2022 (USD MILLION)

TABLE 273 REST OF EUROPE: TRANSFORMER OIL MARKET, BY APPLICATION,
2023–2030 (USD MILLION)

TABLE 274 REST OF EUROPE: TRANSFORMER OIL MARKET, BY SUB-
APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 275 REST OF EUROPE: TRANSFORMER OIL MARKET, BY SUB-
APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 276 REST OF EUROPE: TRANSFORMER OIL MARKET, BY END USER,
2018–2022 (USD MILLION)

TABLE 277 REST OF EUROPE: TRANSFORMER OIL MARKET, BY END USER,
2023–2030 (USD MILLION)

9.5 REST OF THE WORLD

9.5.1 REST OF THE WORLD: RECESSION IMPACT

9.5.2 BY OIL TYPE

TABLE 278 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY OIL TYPE,
2018–2022 (USD MILLION)

TABLE 279 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY OIL TYPE,
2023–2030 (USD MILLION)

9.5.2.1 Mineral oil - by sub-oil type

TABLE 280 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY SUB-OIL
TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 281 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY SUB-OIL

TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.5.2.2 Mineral oil - by inhibition type

TABLE 282 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 283 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

9.5.2.2.1 Naphthenic mineral oil - by inhibition type

TABLE 284 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (NAPHTHENIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 285 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (NAPHTHENIC MINERAL OIL), 2023–2030 (USD MILLION)

9.5.2.2.2 Paraffinic mineral oil - by inhibition type

TABLE 286 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (PARAFFINIC MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 287 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY INHIBITION TYPE (PARAFFINIC MINERAL OIL), 2023–2030 (USD MILLION)

9.5.3 BY APPLICATION

TABLE 288 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 289 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

9.5.3.1 Transformer - by sub-application

TABLE 290 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 291 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

9.5.4 BY END USER

TABLE 292 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 293 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.5.5 BY REGION

TABLE 294 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (USD MILLION)

TABLE 295 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY REGION, 2023–2030 (USD MILLION)

TABLE 296 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY REGION, 2018–2022 (MILLION LITERS)

TABLE 297 REST OF THE WORLD: TRANSFORMER OIL MARKET, BY REGION,

2023–2030 (MILLION LITERS)

9.5.5.1 Middle East

9.5.5.1.1 Growing investments in oil & gas industry and infrastructural developments to increase demand for transformer oil

TABLE 298 MIDDLE EAST: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 299 MIDDLE EAST: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 300 MIDDLE EAST: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 301 MIDDLE EAST: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 302 MIDDLE EAST: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 303 MIDDLE EAST: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 304 MIDDLE EAST: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 305 MIDDLE EAST: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 306 MIDDLE EAST: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 307 MIDDLE EAST: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.5.5.2 Africa

9.5.5.2.1 Focus on reducing blackouts and power outages to fuel demand for transformer oil

TABLE 308 AFRICA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 309 AFRICA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 310 AFRICA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 311 AFRICA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 312 AFRICA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 313 AFRICA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 314 AFRICA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 315 AFRICA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 316 AFRICA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 317 AFRICA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

9.5.5.3 South America

9.5.5.3.1 Growing investments in power generation to enhance market growth

TABLE 318 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2018–2022 (USD MILLION)

TABLE 319 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY OIL TYPE, 2023–2030 (USD MILLION)

TABLE 320 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2018–2022 (USD MILLION)

TABLE 321 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-OIL TYPE (MINERAL OIL), 2023–2030 (USD MILLION)

TABLE 322 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY APPLICATION, 2018–2022 (USD MILLION)

TABLE 323 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY APPLICATION, 2023–2030 (USD MILLION)

TABLE 324 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2018–2022 (USD MILLION)

TABLE 325 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY SUB-APPLICATION (TRANSFORMER), 2023–2030 (USD MILLION)

TABLE 326 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY END USER, 2018–2022 (USD MILLION)

TABLE 327 SOUTH AMERICA: TRANSFORMER OIL MARKET, BY END USER, 2023–2030 (USD MILLION)

10 COMPETITIVE LANDSCAPE

10.1 OVERVIEW

TABLE 328 KEY DEVELOPMENTS IN TRANSFORMER OIL MARKET, 2018–2023

10.2 MARKET SHARE ANALYSIS OF KEY PLAYERS, 2022

TABLE 329 TRANSFORMER OIL MARKET: COMPETITIVE ANALYSIS

FIGURE 35 MARKET SHARE ANALYSIS OF TOP PLAYERS IN TRANSFORMER OIL MARKET, 2022

10.3 MARKET EVALUATION FRAMEWORK

TABLE 330 MARKET EVALUATION FRAMEWORK, 2018–2023

10.4 SEGMENTAL REVENUE ANALYSIS OF TOP MARKET PLAYERS, 2018–2022

FIGURE 36 SEGMENTAL REVENUE ANALYSIS, 2018–2022

10.5 COMPETITIVE SCENARIOS & TRENDS

10.5.1 DEALS

TABLE 331 TRANSFORMER OIL MARKET: DEALS, 2018–2023

10.5.2 PRODUCT LAUNCHES & DEVELOPMENTS

TABLE 332 TRANSFORMER OIL MARKET: PRODUCT LAUNCHES & DEVELOPMENTS, 2018–2023

10.6 COMPANY EVALUATION QUADRANT

10.6.1 STARS

10.6.2 EMERGING LEADERS

10.6.3 PERVASIVE PLAYERS

10.6.4 PARTICIPANTS

FIGURE 37 TRANSFORMER OIL MARKET: COMPANY EVALUATION QUADRANT, 2022

TABLE 333 COMPANY OIL-TYPE FOOTPRINT

TABLE 334 COMPANY REGION FOOTPRINT

11 COMPANY PROFILES

(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*

11.1 KEY PLAYERS

11.1.1 NYNAS AB

TABLE 335 NYNAS AB: BUSINESS OVERVIEW

FIGURE 38 NYNAS AB: COMPANY SNAPSHOT

TABLE 336 NYNAS AB: PRODUCT LAUNCHES & DEVELOPMENTS

TABLE 337 NYNAS AB: OTHERS

11.1.2 ERGON, INC.

TABLE 338 ERGON, INC.: BUSINESS OVERVIEW

TABLE 339 ERGON, INC.: PRODUCT LAUNCHES & DEVELOPMENTS

TABLE 340 ERGON, INC.: DEALS

TABLE 341 ERGON, INC.: OTHERS

11.1.3 PETROCHINA COMPANY LIMITED

TABLE 342 PETROCHINA COMPANY LIMITED: BUSINESS OVERVIEW

FIGURE 39 PETROCHINA COMPANY LIMITED: COMPANY SNAPSHOT

TABLE 343 PETROCHINA COMPANY LIMITED: OTHERS

11.1.4 APAR INDUSTRIES LIMITED

TABLE 344 APAR INDUSTRIES LIMITED: BUSINESS OVERVIEW

FIGURE 40 APAR INDUSTRIES LIMITED: COMPANY SNAPSHOT

11.1.5 SHELL

TABLE 345 SHELL: BUSINESS OVERVIEW

FIGURE 41 SHELL: COMPANY SNAPSHOT

TABLE 346 SHELL: PRODUCT LAUNCHES & DEVELOPMENTS

11.1.6 CALUMET SPECIALTY PRODUCTS PARTNERS, L.P.

TABLE 347 CALUMET SPECIALTY PRODUCTS PARTNERS, L.P.: BUSINESS OVERVIEW

FIGURE 42 CALUMET SPECIALTY PRODUCTS PARTNERS, L.P.: COMPANY SNAPSHOT

TABLE 348 CALUMET SPECIALTY PRODUCTS PARTNERS, L.P.: DEALS

11.1.7 SINOPEC LUBRICANT COMPANY

TABLE 349 SINOPEC LUBRICANT COMPANY: BUSINESS OVERVIEW

TABLE 350 SINOPEC LUBRICANT COMPANY: OTHERS

11.1.8 CARGILL, INCORPORATED.

TABLE 351 CARGILL, INCORPORATED.: BUSINESS OVERVIEW

TABLE 352 CARGILL, INCORPORATED.: DEALS

11.1.9 EXXON MOBIL CORPORATION

TABLE 353 EXXON MOBIL CORPORATION: BUSINESS OVERVIEW

FIGURE 43 EXXON MOBIL CORPORATION: COMPANY SNAPSHOT

TABLE 354 EXXON MOBIL CORPORATION: OTHERS

11.1.10 GULF OIL INTERNATIONAL LTD

TABLE 355 GULF OIL INTERNATIONAL LTD: BUSINESS OVERVIEW

TABLE 356 GULF OIL INTERNATIONAL LTD: DEALS

TABLE 357 GULF OIL INTERNATIONAL LTD: OTHERS

11.1.11 M&I MATERIALS LTD

TABLE 358 M&I MATERIALS LTD: BUSINESS OVERVIEW

TABLE 359 M&I MATERIALS LTD: PRODUCT LAUNCHES & DEVELOPMENTS

TABLE 360 M&I MATERIALS LTD: DEALS

TABLE 361 M&I MATERIALS LTD: OTHERS

11.1.12 PHILLIPS 66 COMPANY

TABLE 362 PHILLIPS 66 COMPANY: BUSINESS OVERVIEW

FIGURE 44 PHILLIPS 66 COMPANY: COMPANY SNAPSHOT

TABLE 363 PHILLIPS 66 COMPANY: DEALS

11.1.13 DOW

TABLE 364 DOW: BUSINESS OVERVIEW

FIGURE 45 DOW: COMPANY SNAPSHOT**11.1.14 REPSOL****TABLE 365 REPSOL: BUSINESS OVERVIEW****FIGURE 46 REPSOL: COMPANY SNAPSHOT****TABLE 366 REPSOL: DEALS****11.1.15 CHEVRON CORPORATION****TABLE 367 CHEVRON CORPORATION: BUSINESS OVERVIEW****FIGURE 47 CHEVRON CORPORATION: COMPANY SNAPSHOT****TABLE 368 CHEVRON CORPORATION: DEALS****11.2 OTHER PLAYERS****11.2.1 GANDHAR OIL REFINERY (INDIA) LIMITED****11.2.2 HYDRODEC GROUP PLC****11.2.3 ENGEN PETROLEUM LIMITED****11.2.4 LUBRITA****11.2.5 PETRO-CANADA**

*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

12 APPENDIX**12.1 INSIGHTS FROM INDUSTRY EXPERTS****12.2 DISCUSSION GUIDE****12.3 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL****12.4 CUSTOMIZATION OPTIONS****12.5 RELATED REPORTS****12.6 AUTHOR DETAILS**

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