



MARKET INTELLIGENCE



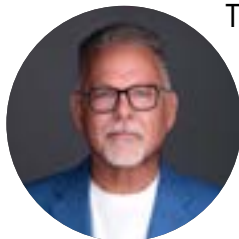
NOVVIA GROUP

THE NEW WAY OF PACKAGING

This report provided courtesy of Novvia Group and its subsidiaries.



A MESSAGE FROM OUR CEO



The oil, petroleum, and lubricant markets are entering 2026 at an important turning point, and the insights in this report reflect both the challenges and the opportunities ahead. Structural pressures, tighter refining capacity, softer petrochemical margins, cost inflation, shifting tariffs, supply-chain disruption, and evolving regulations, are shaping a new “normal” for oil, petrochemical, and lubricant producers. At the same time, a resilient U.S. feedstock position, ongoing AI-driven productivity gains, and growing demand in sustainable products and EV-related fluids point to a future with meaningful room for growth.

In that environment, packaging and distribution decisions play a quiet but important role in your success. They sit at the intersection of supply security, cost, compliance, and customer experience, and they are areas where the right partnership can remove friction rather than add to it. As CEO, the commitment is to continue investing in our North American footprint, technical capabilities, and data-driven tools so we can be a steady, solutions-oriented partner through whatever 2026 brings. The focus is on helping you move through volatility with confidence—protecting continuity of supply, supporting compliant and sustainable packaging choices, and enabling you to pursue the growth opportunities highlighted in this report at the pace that fits your strategy.



A MESSAGE FROM OUR TEAM

The oil, petroleum, and lubricant market is going through a major transition that is showing up in daily business decisions. Costs are under pressure from tariffs and both freight and supply chains can still be unpredictable. Labor constraints are adding strain across operations. At the same time, there are real positives: U.S. feedstocks, new efficiencies from AI, and growing demand for sustainable solutions.

Our priority is making your packaging simpler and more reliable.

We are here to keep your lines running and your customers supplied. Our distribution network with over 40 warehouses helps you secure the

packaging you need, with stocked items and quick turnaround to reduce risk of stockouts and excess inventory.

You can lean on us for straightforward guidance. Our teams are here to help you work through regulatory changes, price swings, and point you toward packaging choices that fit your needs and budget without adding complexity.

The environment will remain challenging, but there are real opportunities to strengthen your supply chain and protect your margins. Thank you for letting us be part of your success story.

Let's do great packaging together in 2026!

2025 RECAP

Refinery closures and conversions tightened fuel and petrochemical supply, which can translate into more price volatility and occasional product-specific shortages for packaged goods. Lubricants and petrochemicals saw cost pressure from tariffs, inflation, and supply-chain disruption, so buyers likely felt rising prices, longer lead times, and a more frequent need to qualify alternates.

2026 MARKET OUTLOOK



U.S. oil output is expected to dip slightly while natural gas prices rise, which can influence resin, solvent, and fuel surcharges that show up in packaging quotes.



Capital spending will be selective and some plants may run lean, so buyers should expect tight capacity on certain items and benefit from locking in programs, forecasts, and blanket orders whenever possible.

REGULATORY + PACKAGING

New and upcoming rules on recyclability, labeling, extended producer responsibility, and hazard communication mean more specs to manage, but also create justification to upgrade to compliant, standardized packaging that reduces risk of fines or rework.

A partner like Novvia Group focuses on reliable packaging, technical support on materials and regulations, and cost-mitigation options.

HEADWINDS



- **Structural oversupply** in some petrochemicals.
- **Continued tariff impacts** on crude, steel, and aluminum can cause uneven pricing.
- **Traditional lubricant volumes may reduce** due to EV growth, longer oil drain intervals, and stricter environmental rules. However, SKUs, specs, and approvals may increase in complexity, giving buyers more to track.

TAILWINDS



- **Global demand is growing**, especially in Asia-Pacific, supporting long-term use of plastics and specialty chemicals, which should keep a wide range of compatible packaging formats available.
- **AI-driven planning and analytics** at suppliers are improving forecast accuracy and inventory optimization, giving buyers better visibility, more reliable lead times, and options for cost-out projections through consolidation and smarter stocking.



2026 REGULATORY ROUNDUP

Anticipated Regulations IN THE U.S. for 2026:

EPA is proposing several structural changes to the Renewable Fuel Standard program:

- Eliminate renewable electricity as a qualifying renewable fuel.
- Reduce the number of RINs generated for imported renewable fuel and renewable fuel produced from foreign feedstocks.

Anticipated Regulations OUTSIDE OF THE U.S. for 2026:

European Union

- The EU Parliament has banned Russian fossil fuel imports effective Jan. 1, 2026.
- The EU plans to require oil and gas companies to buy carbon credits to compensate for offshore activities.
- The EU Emissions Trading System will expand its scope in 2026 to include methane and nitrous oxide for the first time, raising the cost of biofuels, fuel oil, and gasoil bunkers.
- EU member states are implementing the Renewable Energy Directive III (RED III), which includes maritime renewable fuel mandates that affect where and what ships bunker.



- The EU is currently negotiating to remove a 3.7% import duty on U.S. Group II base oil shipments.

Canadian Region

Oil & Gas Sector Greenhouse Gas Emissions Cap Regulations:

- Caps emissions at 27% below 2026 reported levels
- Establish a cap-and-trade system for emissions allowances
- Require operations with production over 365,000 barrels of oil equivalent to remit compliance units annually
- Implement 3-year compliance periods



PACKAGING + DISTRIBUTION

UNITED STATES

New hazard label formats required by OSHA starting January 19, 2026. • Multiple states are raising Extended Producer Responsibility standards for packaging.

EUROPEAN UNION

All packaging must be recyclable and have clearer labeling. • In 2027, packaging must include digital labels or QR codes with environmental attributes.

Want to read even more in-depth market insights?

[Download our Executive Brief here.](#)



HOW NOVVIA GROUP CAN HELP



Turning Insights Into Action

A true packaging partner, not just a vendor—helping you respond to the report's structural pressures and volatility by combining a broad stocking footprint, technical expertise, and data so the right containers are in the right place while managing total landed cost.



Supporting Your Daily Reality

Frontline support for buyers, planners, and plant managers—translating the report's macro trends into practical help by adjusting order patterns, recommending alternates when supply tightens, and coordinating inventory across sites to keep operations safe, efficient, and reliable.



Navigating Regulatory Changes

Regulatory requirements change fast. Regulatory and labeling readiness—aligning packaging, labeling, and documentation with the shifting OSHA, EPR, and recyclability requirements outlined in the report so you can stay ahead of compliance demands without slowing commercial momentum.



Promoting Price Stability

As we see pricing volatility in the market, our sourcing team will keep scouting for the best prices possible. We will continue offering stock agreements, keep best sellers stocked, and use our 40+ warehouses to control expenses and keep lead times tight.



Seizing Growth Opportunities

Enabling growth in next-generation products—supporting the high-potential areas flagged in the report (such as specialty e-fluids, advanced synthetic and bio-based lubricants, and sustainability-focused chemistries) by rapidly qualifying packaging and tailoring formats for new opportunities.



Partnering With You

Our customer commitment—serving as a steady, solutions-oriented partner that helps you act on the report's key headwinds and tailwinds, aligning packaging and distribution strategies with your cost, resilience, and growth goals across the oil, petroleum, petrochemical, and lubricant markets.

WHY NOVVIA GROUP?

“Our focus is on helping you move through volatility with confidence.”

- Eric Speiser, CRO, Novvia Group

OUR FAMILY OF BRANDS



OUR NORTH AMERICAN LOCATIONS



Packaging resilience for your supply chain.

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