



3rd Edition

Lubricants for Motorcycles, Scooters, and Mopeds:

Global Market Analysis and Opportunities

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Base Year: 2017

Forecasts to 2022

Regional Coverage: Asia-Pacific ■ Europe ■ North America ■ South America

The global two-wheeler market, which includes motorcycles, scooters, and mopeds, is expected to cross the 800 million units mark in terms of overall population by 2022. The industry is a moderate-growth industry growing at a rate of 5.0% per annum. Lack of public transportation, especially in rural areas, poor road infrastructure, fuel efficiency, growth in female riders, and growth in the young population are the leading drivers for motorcycle oil demand. However, some factors, such as increasing electric two-wheeler population, restrictions on two-wheeler usage in cities, and the decrease in two-stroke two-wheeler population, are restraining faster market development. This study provides an independent assessment of the developments in the two-wheeler lubricants market.

This Report Helps Subscribers to:

- Assess the global, regional, and country level market for two-wheeler lubricants by product category, type, and viscosity grade
- Identify market segmentation by type of two-wheeler and end-user type and the unique product requirements, challenges, and trends for each segment
- Assess the factory and service fill agreements between leading OEMs and their lubricant suppliers
- Gauge the current and future impact of electric two-wheelers on lubricant demand by region and country
- Understand the dynamics of the installed and retail market segments and identify trends and opportunities
- Identify synthetic penetration levels, future trends, and higher value opportunities



Report Contents

Introduction

Executive Summary

- An overview of key findings

Two-wheeler Market Overview

- Two-wheeler parc by region and key countries
- Two-wheeler production by region and key countries
- Two-wheeler sales by key countries
- Two-wheeler parc forecast by region and key countries
- Trends in key regions

Products Overview

- Two-stroke engine oil specifications
 - JASO specifications
 - API specifications
- Four-stroke engine oil specifications
 - JASO specifications
 - API specifications
 - SAE viscosity grades
- Lubricants market overview
 - Global two-wheeler lubricants demand by product (engine oil, fork/suspension/gear oil, and grease)
 - Lubricants demand by region and key country
 - Overall and regional synthetic penetration
 - Factory-fill demand by region
 - Global two-wheeler lubricants supplier market position and share



Country Profiles

Each country profile is analyzed in detail with respect to:

- Macroeconomic characteristics and outlook
- Two-wheeler parc trend (by vehicle type, in-service activity, and engine capacity) and forecast
- Two-wheeler sale and production
- Leading OEMs of two-wheelers
- Government regulation regarding two-wheeler emission regulations
- Lubricants demand by product, viscosity grade, API, JASO specifications
- Synthetic penetration
- Analysis of retail and installed market segments and channels
- Advertising and promotional activities and initiatives
- Outlook, appraisal, and opportunities

Market Assessment

- Demand drivers
- Demand restraints
- Current and projected market for two-wheeler lubricants
- Market opportunities and threats

Table 1: List of Countries Covered

Region	Countries
Asia-Pacific	China, India, Indonesia, Malaysia, Thailand, the Philippines, and Vietnam
Europe	Germany, Italy, and Spain
North America	Mexico and the United States
South America	Brazil and Colombia



Scope

This report provides a detailed, independent appraisal of this high-volume market, including current and forecast demand by lubricant type, leading countries, and regions.

- Coverage of lubricant demand in the developed world and mature countries, where two-wheelers are used mainly for recreational purposes and the developing world and emerging countries where they are used as a primary mode of transportation.
- Most important is understanding the impact of electric motorcycles and scooters on petrol-fueled vehicles and which countries are leading in their development and adoption.
- This third edition of Kline's analysis is built upon our assessment of the market last covered in 2015 to understand how the industry has evolved in terms of product advances, new market entrants, government regulations, and competition from other forms of transportation, such as public transport and passenger cars.

Key Benefits

This report assists lubricant suppliers in identifying opportunities within the global two-wheeler market. It also serves as an invaluable tool in the strategic planning process.

- A reliable and independent assessment of the market, enabling each subscriber to understand the key dynamics in which this industry operates.
- Understanding current and future regulatory trends and the resultant impact on OEM requirements on product performance to assist product development and product differentiation.
- Competitive intelligence for use in benchmarking and identifying best practices in the industry.
- An assessment of key market segments in terms of their unique requirements, purchasing criteria, distribution networks, challenges for doing business, and opportunities to assist with marketing and sales strategies.
- An appraisal of government policy, market trends and supply and demand drivers, enabling subscribers to position themselves or develop new products to capitalize on these trends.



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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