



7th Edition

# Opportunities in Lubricants: China Market Analysis

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Base Year: 2018/2019

Forecasts to 2023

## Regional Coverage: China

Lubricant demand hit rock bottom back in 2015, due to the economic slowdown and capacity reduction. Since then, recovery has been aided by the anti-overloading regulation and increasingly stringent emission regulation covering commercial vehicles, infrastructure development, implementation of the “One Belt One Road” policy, and a reduction in the purchase tax on small-sized passenger cars. However, volume growth continues to be challenged by such factors as the growth of electric vehicles, an unstable export market, and the increasing use of long drain interval lubricants. Besides declining growth, automotive lubricant markets are being transformed by the growth of e-commerce platforms. This study provides a comprehensive analysis of the Chinese lubricants market, focusing on key trends, developments, challenges, business opportunities, and major suppliers.

## This Report Will Help Subscribers to:

- Understand the current and future Chinese lubricants market
- Understand the impact of emerging regulations on the lubricants market
- Understand the impact of changes in lubricant distribution channels
- Evaluate the impact of electric vehicles
- Understand customer expectations and purchasing criteria and how they will change over the next five to 10 years
- Identify end-use segments and product categories with the most opportunities
- Understand how marketers target customers effectively



# Report Contents

## Introduction

### Executive Summary

- An overview of key findings

### Commercial Automotive Lubricants

- Overall market
- On-highway fleets
  - Buses
  - Taxis
  - Trucks
- Off-highway fleets
  - Agriculture
  - Construction
  - Mining
- Products
  - Engine oil
  - Gear oil
  - Hydraulic and transmission fluids
  - Greases

### Consumer Automotive Lubricants

- Overall market
- Retail segment
- Installed segment
  - Authorized repair garages
  - Independent repair garages
  - Fast-fit stores
- Products
  - Engine oil
  - Gear oil
  - Automatic transmission fluids
  - Greases

## Industrial Oils and Fluids

- Overall market
- End-use markets
  - Chemicals and related products
  - Electric equipment and energy transmission
  - Machinery
  - Primary metals
  - Textiles
  - Aviation, marine, and railways
  - Transportation equipment
  - Mining
  - Oil and gas extraction and petroleum refining
  - Fabricated metal products
  - Other end-use industries
- Products
  - Process oils
  - General industrial oils
  - Industrial engine oils
  - Metalworking fluids
  - Greases

## Suppliers

- BP
- Chevron
- ExxonMobil
- Fuchs Petrolub
- PetroChina
- Shell
- Sinopec
- Tongyi
- Total
- Valvoline
- Other suppliers



## Scope

Opportunities in Lubricants: China Market Analysis provides a detailed and independent appraisal of the complex and fast-growing lubricant market in China. The study identifies market opportunities and challenges for lubricant blenders and marketers in China. Key insights provided in the report include the following:

- Lubricant demand by market segment and product category
- Analysis of different end-use markets, sales channels, and fleet types
- Analysis of different product categories
- Commentary on government regulations and impact on product quality
- Profile of leading lubricant marketers
- Analysis of demand drivers and market outlook
- Evaluation of market opportunities and challenges

## Key Benefits

This report assists lubricant blenders, marketers, and other market participants in identifying opportunities and challenges within the industry. It also serves as an invaluable tool in the strategic planning process. Specifically, the report helps subscribers:

- Develop business strategies by understanding the trends and developments that are shaping the Chinese lubricant market
- Understand market trends, regulations, and quality evolution in the Chinese lubricants market
- Understand economic and other market drivers and the impact on demand outlook
- Design and develop products and marketing strategies for key end-use industries by assessing unmet needs and barriers to entry
- Identify end-use markets and applications with high potential for growth and the challenges and barriers for catering these opportunities
- Understand the competitive landscape
- Evaluate key market opportunities and challenges



## 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 60-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

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