



1st Edition

The HDMO Market in 2040: A Long-term Outlook

Published March 2019

Base Year: 2018

Forecasts to 2040

Regional Coverage: Global

The electrification of commercial vehicles has the prerequisites to undergo exponential growth, mainly driven by market pull, and regulatory support. Plug-in hybrid electric vehicles (PHEV) are already used often as commercial fleet vehicles, bringing about the benefits of reduced total cost of ownership, while complying with low emission regulations in place. Although the electrification of commercial fleets has the potential to substantially reduce the consumption of HDMO, the transition to electric and digitalized commercial fleets will also create a host of market opportunities.

This Report Helps Subscribers to:

- Understand the dynamic of these transformative technologies, the drivers, and barriers to their diffusion, and their impact on HDMO consumption and quality level
- Understand the state of development for the leading country markets and the scope for penetration of these new technologies
- Identify and evaluate the emerging market opportunities and challenges
- Assess the impact on the global HDMO market in terms of future demand at an overall level under various electric vehicle penetration scenarios
- Understand the approach that leading OEMs are adopting to meet tightening emission-reduction legislation
- Assess the impact on the HDMO market supply chain, shifts in customer base, and the emergence of new customer groups



Report Contents

Introduction

Executive Summary

- An overview of key findings

Country Profiles

Detailed profiles of select six HDMO markets include the following information:

Commercial vehicle fleet size and growth

- Description of commercial vehicle fleet by:
 - Major segment (on-highway, off-highway)
 - Weight class (heavy duty, medium duty, light duty)
 - Application (urban [green cities], regional, long-haul)
 - Leading OEMs, trends in commercial vehicle production, sales by fuel type, and population growth

HDMO market overview

- HDMO demand by viscosity grades, factory fill/service fill, quality levels, distribution channels, and end-use industries

Electrification of commercial vehicles

- Current usage of electric and hybrid commercial vehicles
 - New sales of electric commercial vehicles, leading OEMs/brands
- Electrification drivers: regulations promoting decarbonization of transport, total cost of ownership, government targets, OEM aspirations
- Electrification barriers: charging infrastructure, price, driving ranges, usage issues, and other techno-commercial considerations

Other technological disruptors

- Digitalization, telematics

HDMO 2040 market outlook

- Possible scenarios and impact of long-term HDMO demand
- Implications for key players in the HDMO industry
- Appraisal

Table 1: List of Countries Profiled

Brazil

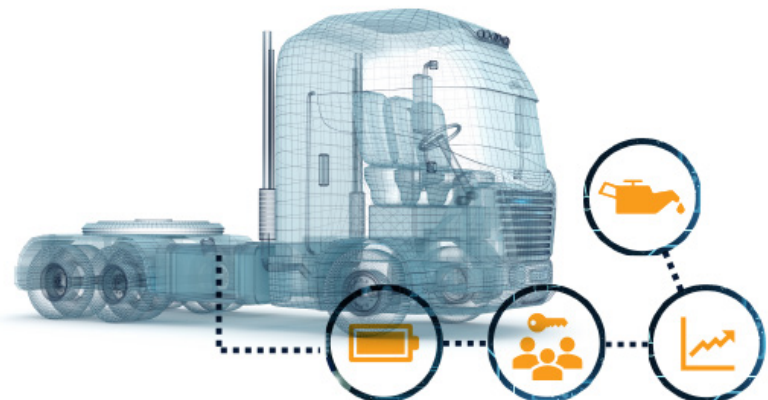
Canada

China

Germany

Japan

United States





Scope

The HDMO Market in 2040: A Long-term Outlook provides a comprehensive independent appraisal of the evolving HDMO market in context of the electrification of commercial fleets, and the emergence of other transformative forces including telematics, and digitalization, among other. Specifically, the study provides the following:

- Assessment of the current and projected commercial vehicle fleet in the leading country markets
- Analysis of commercial vehicle end use industries, and usage characteristics in the leading country markets
- Current and projected HDMO demand in the leading market
- Current and projected penetration of electric commercial vehicles and impact on the HDMO market
- Assessment of the impact of transformative technologies in commercial vehicle fleet operation, and maintenance

Key Benefits

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

- Develop business strategies by understanding the direct implications of the disrupting technologies that are redefining the HDMO market
- Assess future overall HDMO demand based on the commercial vehicle fleet growth, penetration by commercial vehicle technology type, changes in oil drain intervals. Although the outlook for each individual viscosity grade and quality level is not provided, they are assessed on a qualitative basis
- Develop multiple scenarios, and assess the quantitative and structural impact of these on the HDMO market
- Understand techno-commercial and other market drivers and their impact on HDMO demand outlook
- Evaluate market opportunities and challenges
- Design and develop products and market strategies for the emerging HDMO market



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 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 60 years.

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North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277