



# GLOBAL SYNTHETIC LUBRICANTS: MARKET ANALYSIS AND OPPORTUNITIES

Synthetic lubricants use continues to grow globally, driven by increasingly stringent emissions regulations, consumer interest, OEM recommendations, and a plentiful supply of synthetic basestocks. Synthetic fluids, which are better suited to meet the sustainability goals of end users, have been witnessing strong demand growth since the health and economic crisis of 2020. This study will provide a comprehensive analysis of trends in synthetic lubricants, along with opportunities, challenges, and trends in select countries and segments.

## Scope



- Size and segmentation of the global full synthetic, semi-synthetic, and synthetic high-mileage lubricants market by product type and a 5-year outlook
- Full synthetic, semi-synthetic, and synthetic high-mileage penetration by region and country, with country-level market trends and outlook
- Analysis of market challenges and opportunities
- Analysis of channel segmentation and synthetics penetration by segments such as:
  - Quick lubes
  - Franchised workshops
  - Fast fits
  - General repair garages
  - Mass merchandisers
  - Auto-parts stores
- Post-COVID-19 recovery and strengthening trend toward synthetic fluids
- Competitive landscape by supplier for each country profiled and rolled up into a global synthetic market share

## Regional Coverage



Global; with focus on 15 key country markets across the world

## Features and Timing



Base Year: 2022

Published: July 2023

8<sup>th</sup> Edition

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## Introduction

### Executive Summary

An overview of the report findings, plus a forecast based on Kline's FutureView forecasting model

### Global Automotive and Industrial Lubricants Demand Analysis and Forecast

For each lubricant product listed in Table 1, the following information is analyzed:

- Global and regional lubricant demand estimate and outlook
- Current and projected full synthetic, semi-synthetic, and synthetic high-mileage lubricants penetration and demand
- Global and regional supplier market share for full synthetic, semi-synthetic, and synthetic high-mileage products
- Growth drivers and five-year outlook by country, region, and product type
- Market developments impacting the penetration of synthetics
- Market opportunities for lubricant suppliers

<b>Consumer</b>	PCMO, MCO, gear oils, ATF, and grease
<b>Commercial</b>	HDMO, HTF, gear oils, and grease
<b>Industrial</b>	Hydraulic fluids, gear oils, turbine and circulating oils, compressor and refrigeration oils, MWF, industrial engine oils, and grease

## Country Chapters

The synthetic lubricants market in each country listed in Table 2 is profiled, and the following information is provided:

- Overview of the lubricants market by segment
- Current and projected full synthetic, semi-synthetic, and synthetic high-mileage lubricants penetration and demand, including a channel-level split of demand
- Key supplier market share for full synthetic, semi-synthetic, and synthetic high-mileage products and product positioning by segment
- Market developments impacting the penetration of synthetics
- Impact of trends toward sustainability
- Market opportunities and challenges for lubricants suppliers

## Suppliers

Short profiles of leading lubricants marketers will be provided, covering:

- Estimated supplier market share for synthetic and semi-synthetic automotive and industrial lubricants for each country market
- Company product positioning
- Country-level marketing campaign

Australia	India	South Korea
Brazil	Indonesia	Thailand
Canada	Malaysia	Turkey
China	Mexico	United Kingdom
Germany	Poland	United States

# SUBSCRIBER BENEFITS

This study serves as an excellent resource for lubricants marketers that market synthetic and semi-synthetic lubricants or are considering entering the market. Specifically, it assists subscribers by providing:



Business opportunities in synthetic lubricants for key growth country markets around the world



Demand drivers and outlook for synthetic and semi-synthetic lubricants by product, country, region, and segment



Competitive landscape by key suppliers with estimated market shares and marketing activities by segment

## 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. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

## New and Improved Forecasts



Kline's new enhanced forecasting capabilities combines the power of advanced data science techniques and industry expertise to predict future market metrics. We analyze economic, demographic, social media, and consumer trend indicators to identify the factors driving growth. Our algorithms refine predications, and our automated processes provide the latest data for informed decision-making.

# KLINE CREDENTIALS

Kline, an advisory consultancy and market research firm, combines industry expertise and technology to provide highly predictive and actionable data, insights, and advice. Known as "The Industry Experts," we deliver top-notch services in lubricants and petroleum specialties, professional beauty, and specialty chemicals. This focus gives us a competitive advantage and global leadership in these areas. While we also serve adjacent industries, our specialization sets us apart as the leading experts in our chosen fields.



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