



Global Used Oil and Re-refined Lubricants: Market Analysis and Opportunities

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Base Year: 2018 and 2019 Preliminary Estimates

Forecasts to 2023 and 2028

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

The used oil re-refining market has evolved tremendously in the last decade. From being a disposal liability, used oil is now a product with significant economic value. The growth in basestock prices created the incentive to maximize used oil collection. At the same time, the used oil collection infrastructure and re-refining technology continues to improve. This motivated the development of a number of re-refining projects, especially in North America. However, in the recent years, growth of the re-refining industry has been limited due to lack of enforcement of regulations in developing countries, customer perception about re-refined basestocks and lubricants, and low crude oil price resulting in low prices of virgin basestocks. Finding solutions to these challenges will be key for any re-refiner to be successful in this industry.

This Report Helps Subscribers to Understand:

- What is the material flow leading from finished lubricants to used oil collection and disposal in different regions?
- How are collected used oils disposed in terms of energy recovery, re-refining, and other applications?
- What is the used oil collection infrastructure and preferred disposal routes in each region/country?
- What are the target markets for re-refined oils? Which finished lubricant product/market segments use re-refined basestocks, and why?
- Who are the leading used oil collectors and re-refiners in each region/country?
- What is the outlook for re-refined basestocks industry?



Report Contents

Introduction

Executive Summary

- Overview of key findings

Country/Regional Market Profiles

Detailed regional profiles focusing on key markets (listed in Table 1) are provided, including the following information:

- Economic background
- Vehicle population
- Used oil and re-refining regulations
- Finished lubricant demand, used oil generation, and re-refining material balance
- Used oil collection and disposal
- Used oil re-refining market overview
- Market outlook and evaluation
- Opportunities and challenges

Table 1: Countries/Regions Profiled

Brazil

China

India

North America

Russia

Western Europe-a

a- Includes DACH (Germany, Austria and Switzerland), France, Italy, the United Kingdom, Benelux, and Iberia.





Scope

Global Used Oil and Re-refined Lubricants: Market Analysis and Opportunities provides a detailed independent appraisal of this complex market and explores market opportunities and challenges for used oil collectors, re-refiners, lubricant blenders, and marketers, worldwide. Key insights provided in the report include the following:

- Assessment of material flows from finished lubricant to used oil collection to used oil disposal and re-refined basestocks production in different regions including a discussion on used oil collection infrastructure and regulations
- Assessment of different routes to dispose collected used oil - including energy recovery, re-refining, and other end-uses
- Profiles of current and emerging re-refining suppliers by region/country
- Evaluation of re-refined basestocks and lubricants and their key end-use segments
- Analysis of market trends, growth drivers and restraints, and regulation
- Evaluation of re-refined basestock suppliers at a national and regional level
- Evaluation of market opportunities and challenges

Key Benefits

This report assists used oil collectors, re-refiners, lubricant blenders, and marketers in identifying opportunities within the global used oil re-refining 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 driving the used oil re-refining market
- Understand market, regulatory, technology, and other trends and their impact on the re-refining industry
- Identify end-use markets and applications with high potential for growth and the challenges and barriers for catering these opportunities
- Identify key competitors and evaluate their market position
- Evaluate key market opportunities and challenges facing the business



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:

- Lubricant marketers/manufacturers
- Used oil generators
- Government agencies
- Used oil collectors
- Re-refiners
- Industry associations

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 procurement and assessment, 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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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