



The HDMO Market in 2040: A Long-Term Outlook

Base Year: 2020

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2nd edition

Regional Coverage:

This report will provide a comprehensive independent appraisal of the evolving HDMO market in context of a rapid diversification of the powertrain mix of commercial fleets, particularly the electrification of commercial vehicles and hydrogen fuel cell vehicles alternatives. Other transformative forces including telematics and digitalization are also analyzed.

- Asia-Pacific
- Europe
- North America
- Latin America

SCOPE

- › 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
- › Identify and evaluate the emerging market opportunities and challenges
- › Assess the implication of a rapid deployment of green hydrogen
- › Assess the impact on the global HDMO market in terms of future demand at an overall level under various electric vehicle penetration scenarios
- › Assess impact on the HDMO market supply chain, shifts in customer base, and the emergence of new customer groups
- › Understand the approach OEMs are adopting to comply with emission targets

**FEATURING THE IMPACT OF
GREEN HYDROGEN**

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Introduction

Executive Summary

An overview of the report findings

Country Profiles (see Table 1)

Detailed profiles of eight select HDMO markets will be provided, including 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 vehicles sales by OEMs
- 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

- Alternative powertrain technologies, including LPG, CNG, and Green Hydrogen (Fuel Cell Vehicles – FCV)
- 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. COUNTRIES TO BE COVERED

Australia	India
Brazil	Japan
China	South Korea
Germany	United States



REPORT BENEFITS

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

Develop business strategies by understanding the direct implications of the disrupting technologies that are redefining the HDMO market

Develop multiple scenarios and assess the quantitative and structural impact of these on the HDMO market

Assess future HDMO demand based on the commercial vehicle fleet dynamics and fleet operator behavior.=

METHODOLOGY

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