



# LubesNet Database

## 16<sup>th</sup> Annual Release Available Online Through Annual Subscription

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**Base Year: 2021**

**Released:  
January 2022**

**FutureView Forecast:  
2025 and 2030**

**Regional Coverage:**

**LubesNet** helps assess finished lubricants demand at the global, regional, market, segment, product type, and viscosity grade levels. **LubesNet** is the definitive source of identifying and quantifying industry trends and opportunities for global, regional, and independent lubricant and additive suppliers.

Asia-Pacific, North America, Europe, Africa and the Middle East, South America

## This Database Provides Answers to Questions such as:

- › How will the global lubricants markets recover from the impact of COVID-19, and at what point will they return to the pre-pandemic consumption patterns?
- › Which markets consume the highest volumes of 0W-8, 20, 30, and 40 synthetic PCMO currently, and which will be market leaders by 2030?
- › What is the demand for synthetic compressor fluid and synthetic refrigeration oil in Turkey?
- › Which were the leading suppliers of consumer automotive lubricants in Indonesia in 2020, and how does that compare to the Philippines?

**FEATURING: Coverage of 67 markets and share estimates for over 200 finished lubricants suppliers**

# DATABASE CONTENTS

**LubesNet** captures finished lubricants consumption in every important lubricants-consuming market. Demand estimates are segmented according to five core regions, plus a global summary. Each regional segment provides a detailed breakdown of finished lubricants consumption in each market, plus an "All other" category.

**Asia-Pacific:** Australia, China, India, Indonesia, Japan, Kazakhstan, Malaysia, Myanmar, New Zealand, Pakistan, the Philippines, Singapore, South Korea, Sri Lanka, Region of Taiwan, Thailand, Vietnam

**North America:** Canada, Mexico, the United States

**Europe:** Belarus, Belgium, Bulgaria, Croatia, France, Germany, Italy, Netherlands, Poland, Portugal, Russia, Serbia, Slovenia, Spain, Switzerland, Turkey, Ukraine, the United Kingdom

**Africa and the Middle East:** Bahrain, Egypt, Ghana, Kenya, Kuwait, Morocco, Nigeria, Oman, Qatar, Saudi Arabia, South Africa, the United Arab Emirates

**South America:** Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Panama, Peru, Puerto Rico, Trinidad & Tobago, Venezuela

**LubesNet also includes useful supporting information for all 67 markets.**

- › Estimated automotive and industrial lubricants supplier market share
- › Synthetic penetration by leading lubricant type
- › Vehicle parc size and type
- › Estimated PCMO and HDMO demand by API Service Category/ACEA Oil Sequences

		AP	NA	EMEA	APAC	SA	Global		
Lubricator	Process Oil	42	43	42	41	38	34	48	54
	Motorworking Fluids	03	03	03	03	03	03	03	03
	Industrial grease	30	30	30	30	43	38	52	60
	Industrial gear oil	41	42	43	44	49	41	58	59
	Industrial engine oils	31	32	32	32	33	33	110	113
	Hydraulic Fluids	112	112	114	116	124	118	151	204
	Compressor Fluid	07	07	07	07	14	13	14	14
	all other industrial Oils and Fluids	03	03	03	03	35	29	38	33
	<b>New Total</b>	<b>242</b>	<b>243</b>	<b>244</b>	<b>251</b>	<b>407</b>	<b>403</b>	<b>551</b>	<b>600</b>
	<b>Industrial Total</b>	<b>244</b>	<b>243</b>	<b>247</b>	<b>247</b>	<b>254</b>	<b>235</b>	<b>264</b>	<b>289</b>
PCMO	09	09	09	09	07	08	08	09	
Grease									

# DATABASE BENEFITS

The database is easy to use and accessible globally through a single user identification code and password. There are no limitations on the number of users in your organization. An annual subscription is an excellent tool to empower sales, management, and marketing personnel to utilize the most up-to-date data in their areas of responsibility and specific geographies. It will also serve as an invaluable tool in the strategic planning process.

FutureView forecasting enables users to override Kline's per-annum growth rates to run their own "what if scenarios."

Trend View provides a complete view of lubricants demand from 2016 to 2030 to understand how a market is evolving from low-margin to high-margin products.

Market-level supplier share estimates help with entry strategies to identify key competitors, including global majors, national oil companies, public sector undertakings, and regional and independent suppliers.

# 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.

## A Full Spectrum of Services



Custom Research



Market Research Reports



Management Consulting

# KLING 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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