



1st Edition

OEM Genuine Oil Brands and Programs in the Heavy Duty Commercial Segment:

Market Analysis and Opportunities

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Base Year: 2018

Regional Coverage: Global

This study will assess the growth and market penetration of OEM genuine oil brands in the global market for heavy duty motor oil (HDMO). Though commercial vehicle OEMs have not tended to focus on genuine oils in the past, there has been some budding interest in using genuine fluids to ensure proper engine protection, fuel economy, and building brand equity. These genuine oil products and programs are being offered to vehicles under warranty, as well as older, out-of-warranty vehicles. This report will help subscribers understand the impact of genuine oil on the commercial vehicles market and the channels through which it is sold.

This Report Will Help Subscribers to:

- Assess which OEMs offer a genuine oil program available to their vehicle service network by country and region
- Better understand the structure and limitations of these programs to suppliers of aftermarket-branded HDMO seeking to expand their presence in the HD service channel
- Determine which OEMs have the highest penetration of genuine oil programs in their new vehicle network
- Gain the perspective on OEM genuine oil products and programs from the OEMs, service centers, and lubricant distributors
- Assess the growth opportunities in working with heavy duty OEMs in their genuine oil offerings



Report Contents

Introduction

Executive Summary

- An overview of the heavy duty genuine oil market
- A summary of the heavy duty OEM genuine oil programs in place
- An assessment of the future of heavy duty OEM genuine oil market
- A view of the opportunities in the heavy duty OEM genuine oil market

OEM Profiles

- Details of their genuine oil offering
- Preferred route to market in each region
- Estimated overall market penetration of genuine oil for each OEM
- Current lubricant partner in each region
- Advantages and disadvantages of each program
- Outlook for each OEM
- OEMs to be profiled (see Table 1)
- Off-highway OEMs will have an overview of their lubricant programs only (see Table 2)

Country Profiles

Detailed profiles of the seven leading country markets will be provided (see Table 3), including the following information:

- Profiles of the top commercial OEMs in each country, detailing:
 - Genuine oil offerings
 - Route to market for genuine oil
 - Current lubricant partner
 - Market share of each genuine oil

- Commercial fleet size and growth
 - Description of heavy duty vehicle fleet by vehicle size, vehicle age, leading OEMs, and trends in vehicle production, sales, and population growth
- Vehicle ownership and usage characteristics
 - Penetration of heavy duty trucks, growth in ownership, rural versus urban split, annual miles driven, typical oil change intervals, and service channels
- HDMO market overview
 - HDMO demand by viscosity grades, quality levels, and channels
- Outlook

Appraisal and Outlook

- Growth drivers and constraints





Table 1: List of OEMs to be Profiled

Daimler	Jinlong (Golden Dragon)
FAW	KAMAZ
FCA	M&M
Ford	MAN
Foton	Mitsubishi Fuso
Freightliner	PACCAR
GM	Tata Motors
Hino Motors	Volvo CE
Isuzu Motors	VECV

Table 2: Overview of Off-highway OEMs and their Lubricant Programs

AGCO
Caterpillar
John Deere
Komatsu
Kubota
Lingong (SDLG)
Stara
TAFE
Xugong (XCMG)
Yanmar
YTO Group

Table 3: List of Countries to be Profiled

Brazil
China
Germany
India
Japan
Russia
United States



Scope

This study will provide a detailed independent assessment of the HDMO market in context of the diverging fluid specifications, focus on fuel economy, and shifting ownership patterns of heavy duty on-road vehicles. Specifically, the study will provide the following:

- Assessment of the current and projected heavy duty on-road fleet in leading country markets
- Analysis of vehicle ownership and usage characteristics in the leading country markets
- Detail current genuine oil programs and assess upcoming genuine oil entrants
- Current and projected HDMO genuine oil demand in the leading markets by viscosity grades, quality levels, and channels
- Market outlook and the opportunities and challenges in the emerging HDMO genuine market

Key Benefits

This report will assist lubricant marketers in identifying opportunities and challenges within the HDMO genuine oil segment. It will also serve as an invaluable tool in the strategic planning process. Specifically, the report will help subscribers:

- Assess which heavy duty vehicle OEMs offer a genuine oil branded product
- Identify which OEMs offer a genuine oil program available to their vehicle service network by country and region
- Better understand the structure and limitations of these programs to suppliers of aftermarket-branded HDMO seeking to expand their presence in the HD service channel
- Determine which OEMs have the highest penetration of genuine oil programs in their new vehicle network
- Gain the perspective on OEM genuine oil products and programs from the OEMs, service centers, and lubricant distributors
- Assess the growth opportunities in working with heavy duty OEMs in their genuine oil offerings



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:

- 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 50 years.

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