



OPTIMIZING PCMO PORTFOLIO IN THE RAPIDLY CHANGING CHINA MARKET

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PRICE & ORDERING

The study is a comprehensive analysis of how PCMO performance levels and grades will evolve in the future in Mainland China. While the market has been adopting low-viscosity products for some time, tracking their penetration over time is not straightforward.

This analysis uses recommendations from over 150 OEMs across 2,500 models for the past 12 years in China to accurately forecast the performance level and viscosity grade mix of the PCMO market over the next five years.

Scope



- Analyzing trends in OEM engine oil recommendations
 - Trends over time
 - Trends by OEM heritage (Chinese, Japanese, Korean, European, and North American)
 - Trends by vehicle type (sedan, SUV, and MPV)
- Analyzing current and future engine oil consumption by performance level and viscosity grade at an overall level
- Analyzing current and future engine oil by viscosity grade and by channel
- Evaluating competitive landscape to understand market share at an overall level and by major viscosity grade in the OEM and aftermarket channels
- Evaluating market dynamics in terms of margin impact and key decision makers and influencers impacting the choice of viscosity grades

Regional Coverage



China

Features and Timing



Base Year: 2023

To be Published: Q1 2024

PROVIDES INSIGHTS BASED ON 150 OEMS AND OVER 2,500 CAR MODELS

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Introduction

Executive Summary

An overview of the key learnings

OEM Recommendation Analysis

- Evolution trends for oil recommendations from OEMs with a five-year historical view
- Identification of OEM recommendation trends
 - By OEM geography (Chinese, Japanese, Korean, European, and North America)
 - By type of passenger car (sedan, SUV, and MPV)

Lubricant Consumption Analysis

- Overall demand by performance level and viscosity grade
- Viscosity grades by channel
 - OEM (factory fill and franchised workshop)
 - Aftermarket

Competitive Landscape

- Overall market share by key supplier
- Market share in OEM segment by major viscosity grade
- Market share in the aftermarket segment by major viscosity grade

Market Dynamics

- Margin impact (0Ws versus 5Ws versus 10Ws)
- Decision makers and influencers
 - Lubricant blenders
 - OEMs
 - Dealerships and garages
 - O2O platforms
 - Key opinion leaders (KOL)
 - Consumers

Market Evaluation

Geographic market analysis:

- Current demand and growth by city and region
- OEM trends and market share by city and region
- Blender trends and market share by city and region; apparent strategies and future intent of leading blenders
- Market outlook by geography

Market Evaluation

- Market evolution by quality level and viscosity grade
- Volume- versus value-driven portfolio
- Target channels for specific viscosity grades
 - OEMs
 - Aftermarket
 - IWS
 - O2O
 - Other

SUBSCRIBER BENEFITS

This report serves as an excellent resource for understanding how OEM engine oil recommendations are changing and how they will impact the overall PCMO market in terms of viscosity grades and quality levels, and which viscosity grades will lead in which channel.



Understand trends in OEM engine oil recommendations and how they change in terms of OEM geographic heritage and type of vehicle



Understand how the penetration of viscosity grades will change over time in the overall market and among different channels



Evaluate your market position, and modify your portfolio by targeting high-margin or high-volume products

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.

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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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