

# CITY CLUSTERS: NEW FRONTIERS FOR PCMO GROWTH IN MAINLAND CHINA

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PRICE & ORDERING

A comprehensive analysis examining the rapidly changing passenger car servicing market in China with insights provided at a city level, covering the leading 300+ cities. The study will track franchised workshop channel at the city level, covering vehicle sales and parc evolution, OEM activity, and lubricant consumption and identifying the most attractive city/city clusters.

## Scope



- Mapping of the franchised workshop channel (FWS) at city/city cluster level
  - Tracking vehicle sales and parc evolution at city level
  - Tracking OEM activity at city level
  - Tracking lubricant blender activity at city level
  - Tracking PCMO consumption trends by quality level, viscosity grade, and formulation type, as well as by branding
- Geographic trends covering demand evolution, OEM performance, blender performance, and successful geographic expansion strategies
- Sustainability-focused initiatives by OEMs, lubricant blenders, and marketers
- FWS channel attractiveness at city/city cluster level
  - Identifying criteria to evaluate attractiveness
  - Identifying attractive city/city clusters

## Regional Coverage



China

## Features and Timing



Base Year: 2022/2023

Publication Schedule: Foundation Study by Q3 2023 and Quarterly Updates Thereafter

Provides insights for 300+ cities in China

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## Introduction

## Executive summary

An overview of the key learnings

## Passenger car parc dynamics

- City-level passenger car population trends
- New passenger car sales
- Segmentation by powertrain
- Segmentation by OEM

## OEM dynamics

- Distribution of OEMs by city and by heritage (Japanese, South Korean, European, American, Local, Other)
- OEM programs and evolution covering genuine oils, partnerships with Oil Cos, use of digital technology, and retention rates
- Outlook

## Sustainability-focused activities

- OEM and blender sustainability programs and impact on passenger car servicing

## Lubricant consumption

Overall PCMO consumption trends covering:

- By quality level, viscosity grade, and formulation at country level
- By branding type (OEM-branded, merchant-branded, co-branded) at country level

- Overall PCMO consumption by city
- City-level PCMO consumption by quality level, viscosity grade, and formulation—only for the franchised workshop channel

## Geographic trends

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

- Identify criteria that increase or decrease attractiveness of city/city cluster level markets
- Identify attractive cities/city clusters
- Profile select geographic expansion strategies

**TABLE 1. OEMs COVERED**

FAW Toyota	Beijing Hyundai	Dongfeng Nissan	GAC Toyota
Chang'an Ford	SAIC VW	BYD	SAIC GM
GAC Honda	Greatwall Motor	BMW	Benz
FAW VW	Chery	Geely	JAC

# SUBSCRIBER BENEFITS

This study serves as an excellent resource for understanding FWS and IWS channel growth, geographic trends, dealers OEM, blender, and customer behavior and profile. The quarterly monitor will help subscribers to:



Understand geographic trends covering major cities, and identify new opportunities and business challenges



Understand key product usage patterns and OEM programs, and identify differences between different regions and cities



Evaluate the market position of leading OEMs and blenders, and identify key success factors

## 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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