



THE HDMO MARKET IN 2050: A LONG-TERM OUTLOOK

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This report will provide a comprehensive independent appraisal of the evolving HDMO market facing ambitious decarbonization targets particularly will quantify the detrimental effect of electrification in commercial vehicles and other carbon-neutral alternatives. Various disrupting forces including digitalization are also analyzed.

Scope



- Assessment of the current and projected commercial vehicle parc in the leading country markets
- Analysis of commercial vehicle usage characteristics in the leading country markets
- Evaluation of the emerging market opportunities and challenges
- Succinct assessment of potential implications of rapid deployment of sustainable non-fossil fuels alternatives to electric vehicles.
- Analysis of the impact on the HDMO market in terms of future demand under various electrification scenarios
- Assessment of generated impact on the HDMO market supply chain shifts in customer base, and the emergence of new customer groups
- Overview of the strategic approach OEMs are adopting to comply with ever-stringent emission targets

Regional Coverage



Asia-Pacific, Europe, North America, Latin America

Features and Timing



Base Year: 2023

To be Published: Q4 2024

3rd Edition

FEATURING A 2050 MARKET FORECAST

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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 Parc Size and Growth

Description of the commercial vehicle fleet by:

- Major segment (on-highway, off-highway)
- Weight class (heavy duty, medium duty, light duty)
- Leading OEMs, trends in commercial vehicle production, sales by fuel type, and population growth

HDMO Market Overview

- HDMO demand by various key segments including viscosity grades, factory fill/service fill, and quality levels, among other

Electrification of Commercial Vehicles

- Current adoption levels of electric and hybrid powertrains in commercial vehicles
 - New vehicle sales by OEMs
- Key Electrification drivers: regulations fomenting decarbonization of transport, total cost of ownership, governmental targets, OEM aspirations
- Electrification barriers: charging infrastructure, price, driving ranges, and other techno-commercial aspects

Other Technological Disruptors

- Alternative powertrain technologies, including LPG, CNG, and Green Hydrogen (Fuel Cell Vehicles – FCV, hydrogen-powered ICEs)
- Digitalization, telematics

HDMO 2050 Market Outlook

- Long-term impact on HDMO demand
- Implications for key players in the HDMO industry
- Market Appraisal

TABLE 1. COUNTRIES TO BE COVERED

Australia	India
Brazil	Japan
China	South Korea
Germany	United States

SUBSCRIBER BENEFITS

This study 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 electrification scenarios on the HDMO market



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

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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