

## **Pour Point Depressant Market - Global Outlook and Forecast 2022-2027**

Market Report | 2022-11-08 | 281 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global pour point depressant market is expected to grow at a CAGR of 3.93% during 2022-2027.

### **MARKET INSIGHTS**

Globally, the demand and adoption of high-performance pour point depressant market is high due to the increased production landscape of crude oil and the enormous demand for lubricants from the marine industry, construction equipment, heavy machinery, agriculture vehicle, and OEMs.

Pour point depressant additives are vital components in formulating finished lubricant products and base oil. Pour point depressant additives play a vital role in enhancing the overall functioning of base oil by preventing the formation of wax crystals at low temperatures that may impede the lubrication of industrial equipment and oil flow during the transportation of crude oil.

The established markets of Europe and North America are expected to witness significant demand for high-performance pour point depressant products during the forecast period due to the high production unit of crude oil and the increasing use of premium base oil (group II, III, & synthetic base oil) that absolutely align with the low demand for low viscosity lubricant formulation. Thus, this offers vendors many opportunities in the pour point depressant market during the forecast period.

### **KEY TRENDS & DRIVERS**

#### **Escalating Demand from Increasing Production of Crude Oil**

- With the increasing production and demand for crude oil globally, the pour point depressant market has witnessed significant growth over the past years. The U.S., Saudi Arabia, Russia, Canada, and China are the top producing nation for crude oil due to the decline in production cost. Government support has helped players set up their countries' crude oil-producing plants. In crude oil, pour point depressants are injected into waxy crude oil for smooth oil flow during processing, storage, and transportation in

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cold-weather environments.

#### Increasing Demand for Lubricants Based on Premium Base Oil

-□ The increasing trend for low carbon footprint, better fuel economy, drain intervals, and engine oil durability drives the demand for the global pour point depressant market's products in the premium base oil. This is primarily because adding a low viscosity additive to premium base oil enhances the overall functioning of lubricants and enables the OEMs. Other industries, such as marine, achieve sustainability by emitting low carbon emissions.

#### MARKET RESTRAINTS

##### Volatility in Crude Oil Prices

-□ The major challenge faced in the pour point depressant market is the volatility in crude oil prices. Crude oil is the prime raw material to produce pour point depressants and uses polymethacrylate, vinyl acetate, styrene-maleic anhydride, and polyoxyethylene lauryl ether phosphate, among others. Increasing or changing crude oil prices directly impact the price of pour point depressant chemical additive. Thus, fluctuating crude oil price poses a major threat to vendor profit margins.

#### SEGMENTATION ANALYSIS

##### INSIGHTS BY CHEMISTRY

-□ The polymethacrylate segment is expected to be the largest in the global pour point depressant market and accounts for a revenue share of 46.22% of the global industry. Based on chemistry, the global pour point depressant market is divided into six segments: polymethacrylate, poly alkyl methacrylate, styrene-maleic anhydride, polyoxyethylene lauryl ether phosphate, ethylene vinyl acetate, and others. Polymethacrylate holds the highest share in the pour point depressant market, primarily due to its extensive use in crude oil facilities and lubricating oil such as engine oil, hydraulic fluid, and driveline fluid that enhances the viscosity index and offers more shear stability.

-□ Styrene-maleic anhydride emerged as the third-largest segment in the global pour point depressant market and is expected to reach USD 283 million by 2027. The prime characteristics of styrene-maleic anhydride are its high gloss, high heat & chemical resistance, high viscosity, and high dimensional stability. SMA is available at a high molecular weight and is widely used across cooking utensils, business machine housings, electronic appliances, and the interior part of the car (such as ventilation ducts and lenses).

##### INSIGHTS BY END-USE

-□ Based on end-use, the global pour point depressant market is divided into four segments: oil & gas, automotive, heavy industrial, and power generation. The oil & gas segment holds the highest share in the pour point depressant market and accounts for 43.54% of the global share; however, the automotive segment is expected to lead the industry during the forecast period. This is primarily due to the increasing production of commercial vehicles, passenger vehicle, and two-wheelers worldwide that operates in low-temperature environments and to ensure smooth flow of oil in automotive engine, suspension & steering joints, brake system, and other components, pour point depressant are added in automotive lubricants.

-□ The high use of oil for power generation and the high demand for petrochemical that are used in the production of almost all goods ranging from fertilizers to packaging, clothing, medical equipment, tires, digital devices, and others are the prime factors driving the high demand for crude oil production. Globally, the U.S. is one of the biggest oil-consuming countries. In 2021, on average, the country consumed 19.78 million barrels of petroleum per day, an increase in consumption of over 1.6 million barrels per day compared to 2020, as per the data by EIA.

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## GEOGRAPHICAL ANALYSIS

-□APAC dominates the global pour point depressant market as this region's automotive, transportation, power generation and heavy industrial sectors are increasing significantly because of continuous industrialization and infrastructure development. Further, the Asia Pacific holds 38.00% of the global industry share and is expected to grow with a CAGR of 4.25%.

APAC is home to developing countries such as India, China, Japan, South Korea, and Australia. China, Japan, and India led the region and are witnessing a surge in demand from the automotive & transportation sectors, increasing crude oil exploration activities, and the manufacturing of machinery sector driven by the increasing regulation to reduce carbon emissions and continuous industrialization and infrastructure development.

-□North America is the second-largest pour point depressant market and estimates to grow with a CAGR of 3.98% during the forecast period.

The U.S. and Canada are the major markets for pour point depressants in North America. The pour point depressant market in North America is majorly driven by the high penetration of lubricant manufacturing companies that blend additives with the final lubricant products. North America is home to numerous lubricant manufacturers due to the increased production & processing of base oil. Exxon Mobil Corporation, Chevron Corporation, and Phillips 66 are some of the leading lubricant manufacturers operating in the industry.

## COMPETITIVE LANDSCAPE

The global pour point depressant market is moderately fragmented, and the degree of fragmentation is expected to accelerate slowly during the forecast period. Many international and domestic vendors across the geographies compete in terms of brand, price, geographical presence, and technical innovation. For instance, in 2019, Clariant Oil & Services launched "WAXTREAT" Subzero pour point depressants technology for cold weather conditions.

The high entry barriers characterize the market as new entrants require technical skills to produce pour point depressant chemical additives products. Additionally, the pour point depressant market players are working in close liaison with industry experts to understand the current demand of the consumers. So, they can accordingly formulate the product to meet the new engine oil specification and multiple types of gas in the power generation sector. Thus, due to these factors, it offers opportunities for players to enter the industry. Still, at the same time high cost of setting up the production unit and stringent testing facilities across Europe, and North America, new players hesitate to enter the industry.

### Key Vendors

- BASF
- Evonik
- Clariant
- The Lubrizol Corporation

### Other Prominent Vendors

- Afton Chemical
- Callington Haven
- Ganesh Benzoplast
- Goodway Chemicals Private Limited
- Infenium International Limited
- Innospec

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- []Jinzhou Kangtai Lubricant Additives
- []Kemipex
- []Octane Incorporated FZC
- []RX Marine International
- []Shaoxing Shangyu Simo Research Institute Of Organic Chemistry
- []Zhengzhou Chorus Lubricant Additive Co., Ltd
- []A S Harrison & Co Pty Limited
- []Dana Lubricants Factory LLC

## KEY QUESTIONS ANSWERED

- 1.[]What is the revenue from the global pour point depressant market?
- 2.[]What is the projected market size of the global pour point depressant market by 2027?
- 3.[]What is the growth rate of the pour point depressant market?
- 4.[]Which region dominates the global pour point depressant market?
- 5.[]What are the key driving factors in the pour point depressant market?
- 6.[]Who are the key players in the global pour point depressant market?

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