

Aviation Lubricants Market Report by Type (Hydraulic Fluid, Engine Oil, Grease, Special Lubricants and Additives), Technology (Mineral-based, Synthetic), Platform (Commercial Aviation, Military Aviation, Business and General Aviation), End User (OEM, Aftermarket), and Region 2025-2033

Market Report | 2025-10-01 | 136 pages | IMARC Group

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Report description:

The global aviation lubricants market size reached USD 2.3 Billion in 2024. Looking forward, IMARC Group expects the market to reach USD 3.8 Billion by 2033, exhibiting a growth rate (CAGR) of 5.35% during 2025-2033. The market is driven by the growth in air travel, ongoing advancements in aircraft technology, implementation of stringent regulations on engine performance and efficiency, increasing focus on reducing environmental impact and heightening demand for fuel efficiency.

Aviation Lubricants Market Trends:

Increasing demand for aircraft fleet expansion

With the growing passenger and cargo demand in the global air traffic sector, the airline fleets are expanding. While airlines are expanding their fleets in response to this demand, the rate of expansion is much more rampant in regions like Asia-Pacific and the Middle East. Increasing aircraft necessitates raising the maintenance levels-including lubrication of engines, gears, and hydraulic systems. Lubricants play a critical role in reducing friction and preventing wear and tear, thus ensuring the optimal maintenance of the engine. In order to offer the long operational lifespans of their airplanes, for the sake of fuel efficiency, airlines prefer high-performance lubricants leading to increased growth in the market. The demand for specialized lubricants will also gain a boost through the introduction of new aircraft models with advanced technology, hence improving the trajectory of growth in the market.

Technological advancements

Technological advancements in aviation lubricant formulations are a major factor driving the aviation lubricants market growth. The aviation industry demands lubricants that can withstand extreme temperatures, high pressures, and diverse environmental

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conditions. Newer formulations are being developed to enhance the performance of lubricants, ensuring better viscosity, improved thermal stability, and longer service intervals. These innovations help reduce operational costs for airlines by minimizing the frequency of lubricant changes and prolonging engine life. Synthetic lubricants, in particular, are gaining traction due to their superior properties over traditional mineral-based oils. These lubricants offer extended durability, greater protection against corrosion, and enhanced resistance to oxidation. As airlines and military aviation sectors seek to improve operational efficiency, the demand for advanced, high-performance lubricants is expected to rise, driving market expansion.

Increasing regulatory standards

Emission of carbon by aircraft leads to big regulatory bodies such as ICAO imposing tough regulations on cutting the same in the fight against global warming. These prompt airlines to come up with more efficient and eco-friendly means. In this respect, aviation lubricants play a great role as their quality can increase efficiency of the engine and reduce fuel combustion leading to lower emissions. This involves more concentration on environmental-friendly lubricants with lesser volatility and production of lower environmentally hazardous products. Such lubricants comply with regulatory requirements and cater to the sustainability interests of airlines. Since there is growing regulatory pressure, the applications for lubricants that improve fuel efficiency and emission norms will increase and drive the aviation lubricants market.

Aviation Lubricants Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2025-2033. Our report has categorized the market based on type, technology, platform, and end user.

Breakup by Type:

- Hydraulic Fluid
- Engine Oil
- Grease
- Special Lubricants and Additives

Engine oil accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes hydraulic fluid, engine oil, grease, and special lubricants and additives. According to the report, engine oil represented the largest segment.

Engine oil is the largest segment by type in the aviation lubricants market due to its critical role in ensuring optimal engine performance and longevity. Engine oils are essential for lubricating internal engine components, reducing friction, and dissipating heat, which is crucial for maintaining engine efficiency and reliability. The high demand for engine oils is driven by the increasing number of aircraft in service and advancements in engine technology that require specialized lubricants. Using good engine oils is an important factor. This underscores the importance of engine oils in the aviation industry, thereby generating a favorable aviation lubricants market revenue.

Breakup by Technology:

- Mineral-based
- Synthetic

Synthetic holds the largest share of the industry

A detailed breakup and analysis of the market based on the technology have also been provided in the report. This includes mineral-based and synthetic. According to the report, synthetic accounted for the largest market share.

Synthetic lubricants are the largest segment by technology in the aviation lubricants market due to their superior performance characteristics and adaptability to extreme conditions. Unlike traditional mineral-based lubricants, synthetic lubricants offer enhanced thermal stability, oxidation resistance, and reduced friction, which are crucial for modern high-performance engines. This results in longer intervals between oil changes and better engine protection. According to Tribology and Lubrication engineering society, synthetic and part-synthetic lubricants are now used in more than 70 different applications. The advanced properties of synthetic lubricants also align with stringent industry regulations and the growing demand for more reliable and efficient aviation technologies, driving their dominance in the market.

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Breakup by Platform:

- Commercial Aviation
- Military Aviation
- Business and General Aviation

Commercial aviation represents the leading market segment

The report has provided a detailed breakup and analysis of the market based on the platform. This includes commercial aviation, military aviation, and business and general aviation. According to the report, commercial aviation represented the largest segment.

Commercial aviation is the largest segment by platform in the aviation lubricants market due to its substantial contribution to global air travel and the high operational demands placed on commercial aircraft. The rapid growth in passenger air traffic and the rapid expansion of airline fleets drive significant demand for aviation lubricants to ensure engine performance, safety, and reliability. According to the International Air Transport Association (IATA), global passenger traffic is expected to increase by 3.4% annually over the year 2040, fueling the need for continuous maintenance and lubrication of commercial aircraft. The sheer volume of commercial flights and the necessity for regular maintenance and engine care make commercial aviation the dominant segment in the aviation lubricants market.

Breakup by End User:

- OEM
- Aftermarket

Aftermarket exhibits a clear dominance in the market

A detailed breakup and analysis of the market based on the end user have also been provided in the report. This includes OEM and aftermarket. According to the report, aftermarket accounted for the largest market share.

As per the aviation lubricants market overview, the aftermarket represents the largest segment in the aviation lubricants market due to the extensive need for maintenance, repair, and overhaul (MRO) services across existing aircraft fleets. As aircraft age, they require more frequent servicing and replacement of lubricants to ensure continued performance and compliance with safety regulations. This ongoing maintenance is critical for extending the operational life of aircraft and preventing costly downtimes. The growing fleet of aging aircraft and the need for reliable, high-performance lubricants in MRO activities drive the dominance of the aftermarket segment in the aviation lubricants market.

Breakup by Region:

- North America
 - o United States
 - o Canada
- Asia-Pacific
 - o China
 - o Japan
 - o India
 - o South Korea
 - o Australia
 - o Indonesia
 - o Others
- Europe
 - o Germany
 - o France
 - o United Kingdom
 - o Italy
 - o Spain

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- o Russia
- o Others
- Latin America
- o Brazil
- o Mexico
- o Others
- Middle East and Africa

Asia Pacific leads the market, accounting for the largest aviation lubricants market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific was the largest regional market for aviation lubricants.

Asia Pacific is the largest segment by region in the aviation lubricants market due to rapid growth in air travel and significant investments in aviation infrastructure across the region. Countries such as China and India are expanding their airport capacities and increasing their aircraft fleets to meet the rising demand for both domestic and international flights. The region's strong economic growth and increasing middle-class population further drive air travel expansion. According to International Air Transport Association (IATA), routes to, from and within Asia-Pacific will see an extra 2.35 billion annual passengers by 2037, for a total market size of 3.9 billion passengers. Its CAGR of 4.8% is the highest, followed by Africa and the Middle East, Asia Pacific is projected to account for over 40% of the world's passenger traffic by 2030. This substantial growth in air traffic fuels the demand for aviation lubricants, making Asia Pacific the dominant regional market in the industry.

Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the aviation lubricants industry include:

- Aerospace Lubricants Inc.
- Eastman Chemical Company
- Exxon Mobil Corporation
- Whitmore Manufacturing LLC
- Lanxess AG
- Lukoil
- Nyco
- Nye Lubricants Inc. (Fuchs Petrolub SE)
- Rocol (Illinois Tool Works Inc.)
- Royal Dutch Shell plc
- Tecsia Lubricants Pte Ltd
- The Chemours Company

The competitive landscape of the aviation lubricants market is characterized by a mix of established multinational corporations and innovative specialty companies. Major aviation lubricants companies, including ExxonMobil, Chevron, and BP, dominate the market with their extensive product portfolios and global reach. These companies leverage their vast resources to invest in research and development, ensuring they offer cutting-edge, high-performance lubricants. Meanwhile, niche players focus on developing specialized products tailored to emerging technological advancements and sustainability trends. For instance, in 2024, Shell Aviation introduced its new 'Shell Flight' synthetic lubricant, designed to enhance engine efficiency, and reduce environmental impact, reflecting the industry's shift toward eco-friendly solutions. This strategic move underscores the growing emphasis on innovation and sustainability within the competitive landscape.

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Key Questions Answered in This Report

- 1.What was the size of the global aviation lubricants market in 2024?
- 2.What is the expected growth rate of the global aviation lubricants market during 2025-2033?
- 3.What has been the impact of COVID-19 on the global aviation lubricants market?
- 4.What are the key factors driving the global aviation lubricants market?
- 5.What is the breakup of the global aviation lubricants market based on the type?
- 6.What is the breakup of the global aviation lubricants market based on the technology?
- 7.What is the breakup of the global aviation lubricants market based on the platform?
- 8.What is the breakup of the global aviation lubricants market based on the end user?
- 9.What are the key regions in the global aviation lubricants market?
- 10.Who are the key players/companies in the global aviation lubricants market?

Table of Contents:

- 1 Preface
- 2 Scope and Methodology
 - 2.1 Objectives of the Study
 - 2.2 Stakeholders
 - 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
 - 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
 - 2.5 Forecasting Methodology
- 3 Executive Summary
- 4 Introduction
 - 4.1 Overview
 - 4.2 Key Industry Trends
- 5 Global Aviation Lubricants Market
 - 5.1 Market Overview
 - 5.2 Market Performance
 - 5.3 Impact of COVID-19
 - 5.4 Market Forecast
- 6 Market Breakup by Type
 - 6.1 Hydraulic Fluid
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
 - 6.2 Engine Oil
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
 - 6.3 Grease
 - 6.3.1 Market Trends
 - 6.3.2 Market Forecast

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- 6.4 Special Lubricants and Additives
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 7 Market Breakup by Technology
 - 7.1 Mineral-based
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
 - 7.2 Synthetic
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 8 Market Breakup by Platform
 - 8.1 Commercial Aviation
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
 - 8.2 Military Aviation
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
 - 8.3 Business and General Aviation
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast
- 9 Market Breakup by End User
 - 9.1 OEM
 - 9.1.1 Market Trends
 - 9.1.2 Market Forecast
 - 9.2 Aftermarket
 - 9.2.1 Market Trends
 - 9.2.2 Market Forecast
- 10 Market Breakup by Region
 - 10.1 North America
 - 10.1.1 United States
 - 10.1.1.1 Market Trends
 - 10.1.1.2 Market Forecast
 - 10.1.2 Canada
 - 10.1.2.1 Market Trends
 - 10.1.2.2 Market Forecast
 - 10.2 Asia-Pacific
 - 10.2.1 China
 - 10.2.1.1 Market Trends
 - 10.2.1.2 Market Forecast
 - 10.2.2 Japan
 - 10.2.2.1 Market Trends
 - 10.2.2.2 Market Forecast
 - 10.2.3 India
 - 10.2.3.1 Market Trends
 - 10.2.3.2 Market Forecast
 - 10.2.4 South Korea
 - 10.2.4.1 Market Trends

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- 10.2.4.2 Market Forecast
- 10.2.5 Australia
 - 10.2.5.1 Market Trends
 - 10.2.5.2 Market Forecast
- 10.2.6 Indonesia
 - 10.2.6.1 Market Trends
 - 10.2.6.2 Market Forecast
- 10.2.7 Others
 - 10.2.7.1 Market Trends
 - 10.2.7.2 Market Forecast
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.1.1 Market Trends
 - 10.3.1.2 Market Forecast
 - 10.3.2 France
 - 10.3.2.1 Market Trends
 - 10.3.2.2 Market Forecast
 - 10.3.3 United Kingdom
 - 10.3.3.1 Market Trends
 - 10.3.3.2 Market Forecast
 - 10.3.4 Italy
 - 10.3.4.1 Market Trends
 - 10.3.4.2 Market Forecast
 - 10.3.5 Spain
 - 10.3.5.1 Market Trends
 - 10.3.5.2 Market Forecast
 - 10.3.6 Russia
 - 10.3.6.1 Market Trends
 - 10.3.6.2 Market Forecast
 - 10.3.7 Others
 - 10.3.7.1 Market Trends
 - 10.3.7.2 Market Forecast
- 10.4 Latin America
 - 10.4.1 Brazil
 - 10.4.1.1 Market Trends
 - 10.4.1.2 Market Forecast
 - 10.4.2 Mexico
 - 10.4.2.1 Market Trends
 - 10.4.2.2 Market Forecast
 - 10.4.3 Others
 - 10.4.3.1 Market Trends
 - 10.4.3.2 Market Forecast
- 10.5 Middle East and Africa
 - 10.5.1 Market Trends
 - 10.5.2 Market Breakup by Country
 - 10.5.3 Market Forecast
- 11 SWOT Analysis

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- 11.1 Overview
- 11.2 Strengths
- 11.3 Weaknesses
- 11.4 Opportunities
- 11.5 Threats
- 12 Value Chain Analysis
- 13 Porters Five Forces Analysis
 - 13.1 Overview
 - 13.2 Bargaining Power of Buyers
 - 13.3 Bargaining Power of Suppliers
 - 13.4 Degree of Competition
 - 13.5 Threat of New Entrants
 - 13.6 Threat of Substitutes
- 14 Price Analysis
- 15 Competitive Landscape
 - 15.1 Market Structure
 - 15.2 Key Players
 - 15.3 Profiles of Key Players
 - 15.3.1 Aerospace Lubricants Inc.
 - 15.3.1.1 Company Overview
 - 15.3.1.2 Product Portfolio
 - 15.3.2 Eastman Chemical Company
 - 15.3.2.1 Company Overview
 - 15.3.2.2 Product Portfolio
 - 15.3.2.3 Financials
 - 15.3.2.4 SWOT Analysis
 - 15.3.3 Exxon Mobil Corporation
 - 15.3.3.1 Company Overview
 - 15.3.3.2 Product Portfolio
 - 15.3.3.3 Financials
 - 15.3.3.4 SWOT Analysis
 - 15.3.4 Lanxess AG
 - 15.3.4.1 Company Overview
 - 15.3.4.2 Product Portfolio
 - 15.3.4.3 Financials
 - 15.3.4.4 SWOT Analysis
 - 15.3.5 Lukoil
 - 15.3.5.1 Company Overview
 - 15.3.5.2 Product Portfolio
 - 15.3.5.3 Financials
 - 15.3.5.4 SWOT Analysis
 - 15.3.6 Nyco
 - 15.3.6.1 Company Overview
 - 15.3.6.2 Product Portfolio
 - 15.3.7 Nye Lubricants Inc. (Fuchs Petrolub SE)
 - 15.3.7.1 Company Overview
 - 15.3.7.2 Product Portfolio

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15.3.8 Rocol (Illinois Tool Works Inc.)

15.3.8.1 Company Overview

15.3.8.2 Product Portfolio

15.3.9 Royal Dutch Shell plc

15.3.9.1 Company Overview

15.3.9.2 Product Portfolio

15.3.9.3 Financials

15.3.10 Tecsia Lubricants Pte Ltd

15.3.10.1 Company Overview

15.3.10.2 Product Portfolio

15.3.11 The Chemours Company

15.3.11.1 Company Overview

15.3.11.2 Product Portfolio

15.3.11.3 Financials

15.3.11.4 SWOT Analysis

15.3.12 Whitmore Manufacturing LLC

15.3.12.1 Company Overview

15.3.12.2 Product Portfolio

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