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Automotive Lubricants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

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Report description:

Automotive Lubricants Market Analysis

The Automotive Lubricants Market size is estimated at 23.23 billion liters in 2025, and is expected to reach 28.01 billion liters by 2030, at a CAGR of 3.81% during the forecast period (2025-2030). Growth is anchored by an aging global vehicle parc in developed regions, a steady influx of two-wheelers and commercial vehicles in emerging economies, and the sector's pivot toward premium synthetics that improve fuel economy and extend drain intervals. Asia-Pacific remains the core demand center thanks to rising ownership levels and local manufacturing investments, while North America and Europe rely on vehicle longevity to sustain aftermarket sales. Competitive intensity stays moderate: Shell led for the 18th straight year in 2024, but regional blenders gain ground through local capacity additions and tailored formulations. Headwinds such as accelerating electric-vehicle (EV) penetration-31.4 million units on Chinese roads in 2024-and OEM-specified long-drain intervals are mitigated by the higher unit values of API SQ and similar low-viscosity synthetics.

Global Automotive Lubricants Market Trends and Insights

Growing Average Vehicle Age in Major Economies

Vehicle longevity is reshaping lubricant demand profiles. Semiconductor shortages and inflation have slowed vehicle replacement rates in the US, prompting owners to increase oil-change frequency and invest in higher-quality synthetic oils. Europe's fleet is even older-18.1 years in the West and 28.4 years in the East-driving more workshop visits and raising per-vehicle lubricant consumption. Older engines suffer seal degradation, thermal stress, and contamination, all of which accelerate oil degradation and spur demand for premium base stocks. Maintenance outlays for vehicles aged 6-15 years rose from USD 514 to USD 537 in just one year, underscoring the link between age and spend. Scrappage has fallen to 4.20%, the lowest in two decades, prolonging aftermarket revenue streams. Higher-value synthetics now dominate service bays as owners seek extended protection and lower total cost of ownership.

Rising Global Vehicle Parc in Emerging Markets

Emerging economies offset EV-related volume erosion in mature markets. China's motor-vehicle stock reached 453 million units, supported by 35.83 million new registrations in 2024. Two-wheeler ownership continues to surge in India and Southeast Asia, propelled by urban congestion relief and affordable mobility. Commercial fleets running e-commerce and last-mile delivery routes accumulate higher mileage, boosting drain-frequency multiples. Domestic automakers in these regions collaborate with local blenders, allowing agile development of cost-effective oils tailored to varied fuel quality and climate extremes. As a result, the automotive lubricants market keeps expanding even amid global moderation.

Accelerating EV Penetration

EVs remove crankcase oils and many driveline fluids from service menus. China logged 31.4 million new-energy vehicles on its roads by end-2024, up 51.49% year-on-year. The IEA projects global stock could eclipse 250 million by 2030, cutting oil demand by up to 4.3 million bbl/d. Nonetheless, EVs introduce new niches: esters for e-motor bearings, dielectric coolants, and gear greases optimized for high RPM and electromagnetic compatibility. For suppliers, the challenge shifts from volume to value as specialized fluids command two-to-three-fold price premiums over conventional engine oil.

Other drivers and restraints analyzed in the detailed report include:

OEM Factory-Fill Volume Recovery Post-Pandemic / Local Blending Investments in Africa and SE Asia / OEM Long-Drain Interval Specifications /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Engine oil held 58.61% of 2024 volumes, anchoring the automotive lubricants market through ubiquitous use in spark-ignition and compression-ignition engines. Larger sump capacities in light trucks and off-highway machinery amplify its share. Transmission fluids, hydraulic oils, and gear oils serve narrower applications yet remain vital for manual boxes, wet brakes, and power-steering circuits. Greases, though just a fraction of the automotive lubricants market size, are the fastest riser at a 4.28% CAGR as EVs require dedicated bearing greases that handle high RPM and electrical pitting. Suppliers blend synthetic esters and polyurea thickeners to deliver conductivity control and thermal stability, elevating product mix value.

The segment's revenue mix swings toward synthetics as API SQ-compliant oils gain traction. Ultra-low viscosity formulations such as 0W-16 and 0W-12 enable OEMs to meet fleet-average CO? targets, especially in Japan and Europe. Even within heavy-duty oils, the shift from 15W-40 to 5W-30 illustrates demand for thinner, high-HTHS blends that cut fuel costs. As viscosity grades narrow, additive packages diversify-boron esters, molybdenum disulfide, and ashless detergents become cornerstones in next-generation SKUs. The automotive lubricants market therefore balances declining unit volumes against richer per-unit margins.

The Automotive Lubricants Market Report is Segmented by Product Type (Engine Oil, Transmission and Gear Oil, Hydraulic Fluids, Greases), Vehicle Type (Passenger Vehicles, Commercial Vehicles, Motorcycles), and Geography (Asia-Pacific, North America, Europe, South America, Middle East and Africa).

Geography Analysis

Asia-Pacific dominated the automotive lubricants market with a 42.25% share in 2024 and is forecast to grow 4.16% per year through 2030. China alone hosts 453 million vehicles and recorded 35.83 million new registrations in 2024, pairing vast factory-fill demand with a colossal service marketplace. ASEAN governments nurture EV assembly hubs; Thailand's Eastern Economic Corridor plans drove Shell to triple Thai grease capacity, ensuring regional supply resilience. Two-wheeler penetration surpasses 70% of households in Vietnam and Indonesia, bolstering motorcycle-oil volumes.

North America contributes to stable if modest growth. EV sales exceed 1.40 million units annually yet remain below 8% of in-service vehicles, preserving a sizeable internal-combustion fleet through 2030. OEMs emphasize API SQ synthetics with drain intervals topping 10,000 miles, prompting quick-lube chains to upgrade inventories to low-viscosity formulations.

Europe's 18-28 year car fleet sustains lubricant demand despite flat new-car registrations. The continent pioneers CO? cap compliance, spurring adoption of 0W-20 and 0W-16 oils backed by PSA, VW 508/509, and ACEA C6 specifications. Extended-service intervals of up to 30,000 km partially offset volume loss by encouraging premium-grade purchases.

The Middle East & Africa and South America jointly contribute a smaller share of the global volume today but deliver outsized upside. Vivo Energy's branded-lube expansion across 23 African nations and Shell's Raj Petro acquisition in India highlight a south-south competitive trend. Infrastructure build-out, agricultural mechanization, and mining projects generate demand for hydraulic fluids and heavy-duty engine oils resilient to dust and high ambient temperatures.

List of Companies Covered in this Report:

AMSOIL Inc. / Bharat Petroleum Corporation Limited / BP p.l.c. (Castrol) / Chevron Corporation / China National Petroleum Corporation (CNPC) / China Petroleum & Chemical Corporation / ENEOS / Exxon Mobil Corporation / FUCHS / Gazprom Neft PJSC / Gulf Oil International Ltd / Hindustan Petroleum Corporation Limited / Idemitsu Kosan Co.,Ltd. / Indian Oil Corporation Ltd / Lukoil / Motul / Petrobras / PETRONAS Lubricants International / Phillips 66 Company / PT Pertamina Lubricants / Repsol / Saudi Arabian Oil Co. / Shell plc / SK Lubricants Co. Ltd. / TotalEnergies / Veedol International /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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