

Iraq Lubricants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 90 pages | Mordor Intelligence

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Report description:

Iraq Lubricants Market Analysis

Iraq Lubricants Market size in 2026 is estimated at 304.91 Million liters, growing from 2025 value of 296.83 Million liters with 2031 projections showing 348.67 Million liters, growing at 2.72% CAGR over 2026-2031. The automotive recovery keeps engine oils in firm control of volume, while the emerging synthetic and semi-synthetic shift pushes premium blends into broader circulation. International majors are cementing positions through supply partnerships that guarantee OEM service-fill volumes and help navigate import formalities. Over the medium term, power generation lubricants gain momentum as backup diesel gensets remain indispensable despite incremental grid upgrades. Together, these drivers outweigh tariff-related cost spikes, allowing the Iraq lubricants market to maintain an upward trajectory.

Iraq Lubricants Market Trends and Insights

Increased Automotive Parc and Aging Vehicles

Iraq's vehicle import bill touched USD 712.5 million in 2024. Yet the average odometer still sits above 100,000 km, requiring shorter drain intervals that inflate lubricant consumption. High-viscosity engine oil grades, therefore, remain indispensable for drivers facing dusty roads and temperature extremes. The International Monetary Fund's 4.1% GDP growth outlook for 2025 underpins continued vehicle acquisitions, keeping aftermarket sales volumes high. This trend reinforces premium pricing power, which counterbalances modest volume gains and protects margins for branded suppliers.

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Reconstruction-Led Surge in Diesel Genset Usage

Electric-power shortfalls persist even after record generation in 2024, forcing retail, commercial, and industrial users to operate diesel generators throughout peak load hours. The Besmaya plant's Phase 2 upgrade, scheduled online in summer 2025, will ease but not erase the deficit, preserving a lucrative niche for heavy-duty diesel engine oils. Construction of the USD 17 billion Development Road logistics corridor also relies on gensets during early civil-works phases, extending demand at least until 2027. This dynamic creates seasonal pricing spikes that suppliers with strong local inventory can exploit.

Geopolitical Instability and Sanctions Risk

The U.S. Treasury's tightened scrutiny of Iraqi banking channels and an announced 30% tariff on Iraqi products effective August 2025 strain import cash flows and deter advance stockpiling. Logistics corridors through Kurdistan face intermittent disruption after attacks on critical infrastructure shaved 140,000-150,000 bpd from local crude flows in July 2025. Currency depreciation across neighboring economies adds further volatility as suppliers hedge dinar exposure. High-value synthetic imports are particularly vulnerable, forcing distributors to widen price bands or shift buyers toward locally blended mineral alternatives.

Other drivers and restraints analyzed in the detailed report include:

Up-Scaling of Upstream and Mid-Stream Oil Projects
OEM Service-Fill Partnerships (Shell, TotalEnergies)
Increasing EV and Hybrid Imports

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

Segment Analysis

Engine oils maintained a 61.10% share of the Iraq lubricants market size in 2025, thanks to a dominant passenger-car parc and severe operating conditions that hasten oil degradation. Drain intervals average every 4,000-5,000 km, well below global norms, amplifying per-vehicle consumption. Transmission and hydraulic fluids deliver the fastest 3.12% CAGR as the Development Road megaproject, oilfield expansions, and port construction deploy thousands of cranes, excavators, and hydraulic presses that mandate specialized fluids.

General industrial oils rise in tandem with light-manufacturing investments, while gear oils support fleet expansion across regional haulage corridors. Premium marine greases find a niche at the Al-Faw Grand Port, where saltwater corrosion necessitates high-performance additives. Adoption of bio-based lubricants for environmentally sensitive settings gains traction in the food-processing and marine segments, although volumes remain small.

The Iraq Lubricants Report is Segmented by Product Type (Engine Oil, Transmission and Hydraulic Fluid, General Industrial Oil, Gear Oil, Grease, and Other Product Types), End-User Industry (Power Generation, Automotive and Transportation, Heavy Equipment, Food and Beverage, and Other End-User Industries). The Market Forecasts are Provided in Terms of Volume (Million Liters).

List of Companies Covered in this Report:

AMSOIL Inc. Behran Oil Company ENOC Company (ALMEAAD Co.) FUCHS Kuwait Dana Lubes (Shield Lubricants) Morris Lubricants Petrol Ofisi Petromin Corporation Rock Oil Shell PLC TotalEnergies Valvoline Inc.

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Additional Benefits:

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

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