

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

Market Report | 2026-01-16 | 80 pages | Mordor Intelligence

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Report description:

Mexico Automotive Lubricants Market Analysis

The Mexico automotive lubricants market was valued at 696.64 million liters in 2025 and estimated to grow from 720.46 million liters in 2026 to reach 852.27 million liters by 2031, at a CAGR of 3.42% during the forecast period (2026-2031). Current growth stems from Mexico's dual position as North America's leading light-vehicle production base and a rapidly expanding domestic vehicle fleet, together with nearshoring investments exceeding USD 9 billion in 2024, which increase factory fill and aftermarket requirements. Robust activity in passenger car assembly, healthy used-car legalization volumes, and steady gains in annual vehicle-kilometers-traveled (VKT) are generating a stable demand floor, while an urbanizing middle class pushes lubricant preference toward synthetic and low-viscosity grades that promise longer drain intervals. Regulatory headwinds, notably PROFECO's NOM-116-SCFI-2018 quality rule and tighter fuel-import paperwork aimed at curbing illicit trade, have altered supply-chain economics but simultaneously strengthened brand loyalty among compliant players. Multinationals have responded with AI-driven inventory systems and expanded quick-lube footprints, whereas domestic blenders have leveraged localized sourcing and shorter lead times to offset base-oil volatility.

Mexico Automotive Lubricants Market Trends and Insights

Rising Vehicle Parc and Annual VKT Growth

Registered vehicles continued to rise in 2024, supported by a decree that regularized used U.S. imports and provided border

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states with a structural boost in fleet size. Commercial fleet utilization is intensifying as nearshoring shifts output toward inland plants, boosting heavy-truck mileage on corridors linking Guanajuato, Aguascalientes, and Veracruz ports. Each extra kilometer translates into more frequent oil changes, so even modest fleet growth enlarges the serviceable lubricant pool. Congested urban traffic in Mexico City and Guadalajara subjects engines to high-temperature stop-start cycles, which shorten drain intervals and further underpin demand in the Mexican automotive lubricants market. Because VKT continues to outpace GDP growth, lubricant volumes remain less sensitive to macro fluctuations than many other auto-related consumables.

Expansion of Domestic Auto Production and Exports

Vehicle output crossed the 4 million-unit threshold in 2024 and is now anchored by USD 1.2 billion of recent greenfield announcements, including Magna's EV-parts complex and Yokohama's tire plant in Saltillo. Factory-fill demand flows directly into the Mexico automotive lubricants market, while the larger installed base of export vehicles enters the domestic service cycle through dealership maintenance at three-year warranty's end. USMCA's content rules favor Mexico over Asian exporters, prompting Nissan, Kia, and BYD to deepen local sourcing, which in turn raises first-fill and conveyor-lubricant consumption on stamping, machining, and drivetrain lines. The upshot is a multi-year uplift in both industrial and finished-oil volumes.

Crude and Base-Oil Price Volatility

Mexico relies on imports for 87% of its base-oil needs, so any Brent spike or Gulf-Coast refinery outage quickly reverberates through domestic finished-oil pricing. PEMEX's Salamanca unit, operating below 50% utilization for most of 2024, cannot cushion supply shocks. The October 2023 decree, which introduced new paperwork into the customs process, delayed several cargoes by up to 30 days, forcing blenders to draw on safety stocks and triggering spot premiums of USD 120 per metric ton. IEPS fuel excise hikes in 2025 added 7.0 MXN per liter to diesel freight, crimping distributor margins and increasing the landed cost of each drum to workshops in Chiapas and Oaxaca. Such volatility fuels end-user skepticism about price stability, thereby moderating volume expansion in the Mexican automotive lubricants market.

Other drivers and restraints analyzed in the detailed report include:

Penetration of Synthetic and Low-Viscosity Lubricants
Growth of Quick-Lube / E-Commerce Aftermarket Channels
Accelerating EV Adoption
Reducing ICE Oil Volumes

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

Segment Analysis

Engine oil dominated the Mexico automotive lubricants market in 2025 with a 68.55% share, supported by a heat-intensive climate and congested city traffic that shorten drain intervals. The segment advanced through factory-fill requirements on more than 4 million locally built cars, while the aftermarket gained extra momentum from the regularization of used vehicles, which pumped older, maintenance-hungry cars back into service. Premium synthetics captured a growing slice as Castrol unveiled hybrid-ready formulations and Motul moved into large-capacity motorcycle oils that promise 30,000-km life. Price sensitivity remains, yet higher fuel prices encourage motorists to seek the efficiency edge of 0W-20 ranges.

Automatic transmission fluids posted the fastest 4.24% CAGR and are on pace to approach 11.80% of the Mexico automotive lubricants market by 2031. Every new eight-speed gearbox model from Kia, Nissan, and Stellantis features long-life ATF, while urban buyers tend to gravitate towards autos for their convenience in traffic. Manual-gear oils retain importance in light trucks and agriculture, but their share slips annually. Brake fluids and greases register steady, maintenance-based growth, whereas power-steering fluids decline in sync with the shift to electric racks. Suppliers have begun bundling small-volume SKUs into

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multi-pack kits to improve shelf-turns at quick-lubes in Zacatecas and Morelia, a tactic moderating inventory risk.

The Mexico Automotive Lubricants Market Report is Segmented by Product Type (Automotive Engine Oil, Manual Transmission Fluids, Automatic Transmission Fluids, Brake Fluids, Automotive Greases, Other Product Types) and Vehicle Type (Passenger Vehicles, Commercial Vehicles, and Two-Wheelers). The Market Forecasts are Provided in Terms of Volume (Liters).

List of Companies Covered in this Report:

Bardahl Manufacturing Corporation BP Plc (Castrol) Chevron Corporation ExxonMobil Corporation FUCHS Lubricantes de America S.A. de C.V LUKOIL Mexicana de Lubricantes SA de CV Motul Raloy Repsol Roshfrans Shell PLC TotalEnergies Valvoline Global Operations

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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