

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

Market Report | 2026-02-09 | 80 pages | Mordor Intelligence

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Report description:

Canada Lubricants Market Analysis

The Canada Lubricants Market is expected to grow from 862.73 million liters in 2025 to 877.32 million liters in 2026 and is forecast to reach 953.84 million liters by 2031 at 1.69% CAGR over 2026-2031. This steady trajectory reflects the push-and-pull between established industrial demand, ongoing oil-sands activity, and headwinds from the transition to transport electrification. In 2024, passenger and commercial vehicles together generated more than half of total consumption, yet the market's center of gravity is already tilting toward industrial, marine, and off-highway sectors that face no immediate electrification substitute. North American base-oil prices slipped USD 0.15-0.50 per gallon in late-2024, placing margin pressure on blenders but also spurring efficiency investments, strategic bulk purchasing, and renewed distributor consolidation. Synthetic and bio-based formulations are carving out higher-margin niches as Environment and Climate Change Canada's phased PFAS restrictions compel rapid reformulations. Meanwhile, long-cycle mining projects, high-horsepower marine engines, and renewable-diesel process units provide resilient, high-value outlets for specialty lubes, shielding the Canada lubricants market from an outright volume contraction.

Canada Lubricants Market Trends and Insights

Growing Sales of Motor Vehicles

New-vehicle registrations rebounded in 2024, and after-sales networks are scaling to meet service demand. Valvoline Great

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Canadian Oil Change, now at 130 sites, topped the J.D. Power service index with a score of 834. Federal backing of Project Arrow signals ongoing domestic assembly, while Ontario's modernization grants of up to CAD 150,000 per supplier are encouraging precision machining that needs premium cutting fluids. Electric-vehicle uptake is not shrinking lubricant volumes; it is redistributing them toward specialized transmission and coolant products designed for high dielectric strength. The trend is expected to keep the Canadian lubricants market on a steady replacement cycle rhythm, even as average drain intervals lengthen.

Increasing Demand from Manufacturing Industry

Manufacturing contributes about CAD 174 billion to GDP and is targeting productivity gains of 2.5%-9.9% over three years. The Advanced Manufacturing Cluster has earmarked CAD 427 million for automation and additive projects, all of which rely on thermally stable hydraulic and spindle oils. Digital-adoption grants of CAD 15,000 are nudging SMEs toward high-speed CNC systems that require low-mist metalworking fluids. Energy-management programs show friction-reduction savings of up to 6% when synthetic gear oils replace mineral grades, helping justify their price premium. These upgrades directly enlarge the addressable pool for the Canada lubricants market.

Risks Associated with Lubricating Oils

ZDDP remains indispensable for wear protection, yet its phosphorus can poison catalytic converters, pressing OEMs to cap additive doses. Canadian assessments flag methyl-benzothiazole as toxic, prompting substitution in anti-corrosion packages. Food-grade, marine, and forestry users face the toughest balance between biodegradability and load-carrying capacity. The technical challenge of finding cost-effective, non-toxic replacements may slow innovation tempo and impose higher formulation costs, trimming short-term momentum in the Canada lubricants market.

Other drivers and restraints analyzed in the detailed report include:

Shift Toward High-Performance Synthetic Lubricants
Expansion of Mining and Oil-Sands Operations
Volatility in Base-Oil Prices

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

Segment Analysis

Automotive engine oils retained 38.92% of Canada lubricants market share in 2025, underscoring the segment's historic weight even as electrification advances. Industrial engine oils are smaller in absolute volume but are poised to outgrow the market at a 2.21% CAGR, driven by oil-sands generators, diesel compressors, and shale-gas prime movers. Transmission and hydraulic fluids benefit from construction equipment re-fleeting; gear oils hold steady in forestry skidders and marine reduction boxes, where ISO VG 680 synthetics rival straight mineral 90-weight in lifecycle cost. Metalworking fluids are experiencing a mild rebound in aerospace and EV-battery component machining, offsetting a decline in brake fluid demand as regenerative braking systems proliferate.

Canada's lubricants market participants are therefore shifting their R&D budgets toward multi-grade CK-4/FA-4 diesel oils, long-life gear synthetics, and low-fog neat cutting oils formulated with ashless extreme-pressure packages. Packaged-size mixes are also evolving: 20-liter pails for quick-lube channels are slow, while 208-liter drums and 1,000-liter IBCs account for a growing share in industrial depots. The channel shift favors suppliers able to finance bulk-delivery fleets and remote filtration services, deepening account entrenchment across mines and processing plants. Those same suppliers see higher margin capture from synthetic blends that enhance oil-sampling intervals and mitigate unplanned downtime.

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The Canada Lubricants Market Report is Segmented by Product Type (Passenger Car Motor Oil, Heavy-Duty Engine Oil, Motorcycle Oil, Industrial Engine Oil, Transmission and Gear Oils, and More), End-User Industry (Automotive, Marine, Aerospace, Heavy Equipment, and More), and Base Stock Type (Mineral Oil-Based Lubricants, Semi-Synthetic Lubricants, and More). The Market Forecasts are Provided in Terms of Volume (Liters).

List of Companies Covered in this Report:

Boss Lubricants BP plc (Castrol) Chevron Corporation Exxon Mobil Corporation FUCHS HF Sinclair Corporation KLONDIKE Lubricants Corporation Phillips 66 Company Shell plc TotalEnergies Valvoline

Additional Benefits:

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

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