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

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

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Report description:

Saudi Arabia Lubricants Market Analysis

The Saudi Arabia Lubricants Market was valued at 677.67 Million Liters in 2025 and estimated to grow from 705.86 Million Liters in 2026 to reach 865.41 Million Liters by 2031, at a CAGR of 4.16% during the forecast period (2026-2031). Solid demand stems from Vision 2030-driven industrial projects, steady vehicle-parc expansion, and large-scale power-generation investments. Consolidation moves such as Saudi Aramco's Valvoline acquisition and a potential Castrol bid add technological depth while deepening domestic value-chain integration. Growth is also enabled by localization initiatives like Luberef's LubeHUB, which reduces import dependencies for base oils and additives. Meanwhile, the shift toward low-SAPS synthetics, rapid digitalization of distribution, and rising consumption in petrochemical hubs sustain positive volume momentum even as electric-vehicle (EV) adoption begins trimming long-term engine-oil demand.

Saudi Arabia Lubricants Market Trends and Insights

Continued Growth of Saudi Vehicle Parc

Saudi Arabia's expanding vehicle stock keeps lubricant volumes buoyant. Commercial fleets operating in extreme heat and dust require frequent fluid changes, lifting per-vehicle consumption. Telematics-based maintenance programs used by fleet operators are, however, nudging demand toward longer-lasting premium synthetics that lower downtime. Automotive-specific services, including condition-monitoring and OEM-approved formulations, now form a core differentiator for suppliers courting national-fleet contracts.

Vision-2030 Led Industrial Diversification

National Industrial Development and Logistics Programme (NIDLP) incentives are reshaping demand, with over USD 130 billion invested in new factories since 2016. Eastern Province petrochemical complexes such as Amiral and PlasChem Park generate steady orders for hydraulic fluids, metalworking fluids, and specialty greases for precision equipment. SABIC's NUSANED initiatives promote local catalyst and additive production, pressing suppliers to deliver high-performance formulations aligned with Industry 4.0 manufacturing. These changes deepen the Saudi Arabia lubricants market's exposure to heavy-industry buyers while encouraging vertical integration of additive chemistry within the Kingdom.

EV Penetration Trimming Engine-Oil Volumes

EV registrations tripled to about 800 units in 2024, and policy targets call for 500,000 units of annual domestic output by 2030. Although absolute numbers remain low, every battery-electric vehicle displaces 4-6 liters of engine oil consumption per service interval. Charging-infrastructure build-outs under the state-backed eViq initiative will accelerate adoption in metropolitan corridors. Lubricant suppliers are hedging exposure by developing gearbox fluids for hybrids, dielectric coolants for battery packs, and specialty greases for charging disconnects, positioning for a gradual product-mix shift rather than outright volume collapse.

Other drivers and restraints analyzed in the detailed report include:

Shift to Low-SAPS and Premium SyntheticsLuberef Lubehub Supply LocalizationCounterfeit and Grey-Import Lubricants

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

Segment Analysis

Engine oil generated 63.72% of the total 2025 volume, thanks to the Kingdom's large vehicle parc and harsh climate that necessitates frequent changes. The Saudi Arabia lubricants market size for engine oil is still expected to advance, but at a moderating pace as fleet operators stretch drain intervals through synthetics. Greases, although on a smaller base, will clock the fastest 4.55% CAGR to 2031, supported by industrial machinery, renewable-energy bearings, and construction equipment needs. Hydraulic-fluid demand tracks infrastructure roll-outs, while metalworking fluids benefit from factories added under NIDLP. The forthcoming domestic additive plant enhances formulation flexibility, supporting specialized blends for aerospace and pharmaceutical machining.

Digitization and predictive-maintenance adoption in manufacturing increase the appetite for sensor-friendly lubricants integrated with IoT platforms. Suppliers are therefore bundling fluids with analytics dashboards that flag contamination or viscosity shifts in real time. Overall, premium product tiers capturing higher margins help offset slower growth in conventional mineral-oil categories.

The Saudi Arabia Lubricants Report is Segmented by Product Types (Engine Oils, Greases, Hydraulic Fluids, Metalworking Fluids, and More), Distribution Channel (Distributors/Retailers, Gasoline Stations, and Direct Channel), and End-User Industry (Automotive, Power Generation, Heavy Equipment, Metallurgy and Metalworking, and Other End-User Industries). The Market Forecasts are Provided in Terms of Volume (Million Liters).

List of Companies Covered in this Report:

BP P.L.C (Castrol) Chevron Corporation (Chevron AlBakri Lubricants Company (CBL)) Eni SPA ExxonMobil Corporation (Arabian Petroleum Supply Company (APSCO)) FUCHS (Alhamrani-FUCHS Petroleum Saudi Arabia Limited (AFPSA)) Petroliam Nasional Berhad (PETRONAS) Petromin Corporation Saudi Arabian Oil Co. (SAUDI ARAMCO) Shell PLC (Aljomaih and Shell Lubricating oil company Limited (JOSLOC)) TotalEnergies

Additional Benefits:

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

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