

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

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Report description:

UAE Lubricants Market Analysis

UAE Lubricants Market size in 2026 is estimated at 172.54 Million Liters, growing from 2025 value of 166.66 Million Liters with 2031 projections showing 205.18 Million Liters, growing at 3.53% CAGR over 2026-2031. This steady trajectory reflects structural moves toward higher value synthetics, local base-oil supply from the Ruwais refinery, and an expanding industrial base that positions the country as a regional re-export hub. Government programs such as "Make it in the Emirates" continue to channel capital toward heavy industry, while Euro-5 import standards are steering demand to low-ash, low-sulfur formulations. Local champions benefit from proximity, climate-specific blends, and strong direct sales networks, but they must navigate margin pressure from rising Asian freight rates and Group III oversupply. Counterfeit infiltration, rapid taxi fleet electrification in Dubai, and volatile crude pricing remain the principal headwinds that temper growth.

UAE Lubricants Market Trends and Insights

ADNOC Ruwais Refinery Expansion Raises Local Base-Oil Supply

The multi-phase upgrade at Ruwais increases Murban light crude routing to base-oil units and lifts scheduled exports to 1.665 million barrels per day by late 2024, replacing volatile Asian cargoes and trimming freight bills. Domestic feedstock allows blenders to optimize formulations, support premium synthetics, and hedge against currency swings. Cost savings filter through to industrial buyers, reinforcing the UAE lubricants market as a sourcing base for regional re-exports. The project aligns with national

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diversification goals and offers long-term supply security during global logistics disruptions.

"Make it in the Emirates" Industrial Push

The National In-Country Value program directed AED 48 billion into local procurement by H1 2024 and lifted Emirati employment at ICV-certified firms by 40%. Dubai Industrial City's 13.9 million square-foot expansion brings 300 factories online, while Abu Dhabi's strategy targets AED 172 billion in manufacturing value by 2031. These investments elevate demand for hydraulic fluids, gear oils, and specialty greases, underpinning growth in the UAE lubricants market. Customs exemptions on machinery and inputs further improve the economics of local blending, drawing international majors to set up in-country lines.

Rapid EV Adoption in Dubai Taxis

Hydrogen fuel-cell Toyota Mirai pilots and the RTA pledge to electrify 25% of transport modes by 2030, eliminating routine passenger-car motor oil demand across the emirate's 12,000-strong taxi fleet. Public transport patronage topped 360 million trips in H1 2024, removing 1 million daily car journeys and eroding combustion-engine lubricant volumes. While EV-specific thermal-management fluids emerge, their fill capacities are smaller than conventional PCMO sums, pressing overall growth for the UAE lubricants market.

Other drivers and restraints analyzed in the detailed report include:

Post-COVID Rebound in Construction Equipment Parc
Gradual Shift from Group I To Group II/III Base Oils
Counterfeit Lubricants in Grey Markets

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

Segment Analysis

Engine oils held 55.35% of the UAE lubricants market in 2025 due to a large on-road fleet and extensive construction machinery. The segment's defensive bulk ensures stable baseline volumes, though value expansion now comes from low-SAPs, high TBN synthetics engineered for Euro-5 diesel after-treatment compatibility. Greases, the fastest-advancing product, grow at 5.40% CAGR as newly launched factories in Jebel Ali, Khalifa Industrial Zone, and Hamriyah adopt high-load bearings and enclosed gear drives requiring calcium-sulfonate or lithium-complex greases that tolerate desert dust ingress.

Local suppliers capitalize on regional climatic extremes. ENOC's PROTEC X-TREME SAE 5W-40 covers both passenger-car and light-duty diesel segments and advertises 20,000 km drain potential under GCC conditions. Emarat's Power Plus 20W-50 remains popular with older taxis and small fleets seeking thick-film protection during peak summer heat. These climate-specific blends differentiate local brands inside the UAE lubricants market size parameters while maintaining global specification compliance.

The UAE Lubricants Report is Segmented by Product Types (Engine Oils, Greases, Hydraulic Fluids, Metalworking Fluids, Transmission and Gear Oils, and Other Product Types), Distribution Channel (Distributors/Retailers, Gasoline Stations, and Direct Channel), and End User (Automotive, Power Generation, Heavy Equipment, Metallurgy and Metalworking, and Other End-User Industries).

List of Companies Covered in this Report:

Abu Dhabi National Oil Company (ADNOC) P.J.S.C. BP p.l.c. Dana Lubricants Factory LLC Emarat Emirates National Oil Company (ENOC) ExxonMobil Corporation Gulf Oil International Ltd Oscar Lubricants LLC Petromin Corporation Sharjah National Lube Oil Co.

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Additional Benefits:

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

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