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North America Passenger Vehicle Lubricants Aftermarket - A Regional and Country Analysis: Focus on Application, Product, and Regional Analysis - Analysis and Forecast, 2025-2035

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Abstracts

North America passenger vehicle lubricants aftermarket was valued at $9,591.0 million in 2024 and is projected to grow at a CAGR of 5.53%, reaching $17,327.4 million by 2035. The North America passenger vehicle lubricants aftermarket is being driven by several interrelated factors, such as consumer demand for advanced technology, regulatory incentives for green vehicles, rising disposable incomes, and an increasing shift toward electric and autonomous vehicles. These drivers are fostering innovation in the automotive sector, pushing manufacturers to develop vehicles that align with evolving consumer preferences, regulatory standards, and technological advancements. As these trends continue, the market is poised for significant growth in the years ahead, particularly in electric mobility and smart vehicle technologies.

Introduction of North America Passenger Vehicle Lubricants Aftermarket

The study conducted by BIS Research highlights the North America passenger vehicle lubricants aftermarket, which is one of the largest and most dynamic automotive markets globally. It includes countries such as the U.S. and Canada, with the U.S. being the dominant player in the region. This market encompasses a wide range of vehicles, including compact cars, sedans, SUVs, crossovers, and electric vehicles (EVs). It is shaped by several interrelated factors such as consumer preferences, economic conditions, technological advancements, and government policies. Over the past few decades, the North American automotive industry has witnessed rapid transformations driven by changing consumer demands and the adoption of innovative technologies. Consumer preferences have shifted toward larger vehicles such as SUVs, with an

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increasing focus on sustainability and electric mobility. At the same time, advancements in connectivity, autonomous driving, and smart technologies are redefining how vehicles are designed, produced, and used.

Market Introduction

The North America passenger vehicle lubricants aftermarket has been experiencing a period of significant transformation. As of the latest reports, the market is undergoing a shift toward electric mobility, a growing demand for SUVs, and continued technological advancements in areas such as autonomous driving and in-vehicle connectivity. The U.S., as the largest contributor to this market, plays a pivotal role in influencing trends and consumer behavior across the region. North American consumers have favored larger vehicles such as SUVs due to the region’s vast landscapes, road infrastructure, and lifestyle preferences. However, over the past decade, there has been a noticeable increase in the popularity of electric and hybrid vehicles. This trend is driven by heightened environmental awareness, rising fuel prices, and the regulatory push for lower carbon emissions.

Industrial Impact

The North America passenger vehicle lubricants aftermarket has a profound impact on various sectors within the region, driving growth, innovation, and transformation across industries. The influence of this market spans beyond just the automotive industry, affecting related sectors such as manufacturing, supply chains, technology, and sustainability initiatives.

Market Segmentation

Segmentation 1: by Propulsion Type

- Internal Combustion Engine (ICE) Vehicle
- Electric Vehicle (EV)
  - Battery Electric Vehicle (BEV)
  - Hybrid Electric Vehicle (PHEV/HEV)

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Internal Combustion Engine to Dominate the North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type)

The internal combustion engine (ICE) vehicle continues to lead the North America passenger vehicle lubricants aftermarket application segment due to its dominant presence in the market. Despite the increasing adoption of electric vehicles, ICE vehicles remain the preferred choice for many consumers, driven by their established infrastructure and widespread availability. Additionally, the ongoing demand for engine maintenance and performance enhancement in these vehicles contributes to the sustained need for lubricants. As a result, the ICE vehicle segment holds a significant share of the lubricants aftermarket in North America. The wide range of lubricants required for different engine types and the relatively longer lifespan of ICE vehicles further solidify its leading position in the segment. Moreover, the extensive network of service centers and repair shops supporting ICE vehicles adds to the consistent demand for lubricants.

Segmentation 2: by Consumer Type

DIY (Do-It-Yourself)

DIFM (Do-It-For-Me)

Do-It-For-Me (DIFM) to Dominate the North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type)

The DIFM segment leads the North America passenger vehicle lubricants aftermarket by consumer type due to the increasing preference for professional services over DIY maintenance. Consumers are prioritizing convenience and expertise, opting for service centers to ensure optimal performance and longevity of their vehicles. This trend is driven by the complexity of modern vehicles and the specialized knowledge required for lubricant selection and application. Additionally, the availability of trained professionals and well-established service networks further boosts the demand for DIFM services. As a result, this consumer type holds the largest share in the lubricants aftermarket.

Segmentation 3: by Sales Channel

OEM Dealer

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Quick Lube

Garage/Repair and Tire

Auto-Parts Retail

Mass Retail (Walmart/Costco/Sam's)

E-commerce/Online

Others

Garage/Repair and Tire to Dominate the North America Passenger Vehicle Lubricants Aftermarket (by Sales Channel)

The garage/repair and tire sales channel segment holds a leading position in the North America passenger vehicle lubricants aftermarket, capturing a substantial market share due to its direct consumer access and service frequency. This channel benefits from a high volume of vehicle maintenance activities, including oil changes and tire services, which drives lubricant demand. Independent garages and tire service centers offer convenience and competitive pricing, making them preferred choices for vehicle owners seeking timely and reliable lubricant products.

Segmentation 4: by Product Type

PCMO (Passenger Car Motor Oil)

ATF (Automatic Transmission Fluid)

HDEO (Heavy-Duty Engine Oil)

CVTF (Continuously Variable Transmission Fluid)

Gear Oil (Differential/Axle Fluids)

e-Axle/EV Driveline Fluids

Racing/Performance Oil

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Others

Passenger Car Motor Oil to Dominate the North America Passenger Vehicle Lubricants Aftermarket (by Product Type)

Passenger car motor oil leads the North America passenger vehicle lubricants aftermarket product segment due to its essential role in maintaining engine performance and longevity. As the most commonly used lubricant in passenger vehicles, PCMO is required for regular oil changes, which are a critical aspect of vehicle maintenance. The widespread ownership of passenger cars and the need for frequent oil changes contribute to the consistent demand for PCMO. Additionally, advancements in engine technology and increasing consumer awareness of engine care further drive the adoption of high-quality PCMO products in the aftermarket.

Cross-Segmentation: Sales Channel by Product Type

OEM Dealer (PCMO, ATF, CVTF, Gear Oil, e-Axle/EV Driveline Fluid, Racing/Performance Oil, Others)

Quick Lube (PCMO, ATF, CVTF, Gear Oil, Others)

Garage/Repair and Tire (PCMO, ATF, CVTF, Gear Oil, e-Axle/EV Driveline Fluid, Racing/Performance Oil, Others)

Auto-Parts Retail (PCMO, ATF, CVTF, Gear Oil, Racing/Performance Oil, Others)

Mass Retail (PCMO, ATF, CVTF, Gear Oil, Racing/Performance Oil, Others)

E-commerce/Online (PCMO, ATF, CVTF, Gear Oil, Racing/Performance Oil, Others)

Others (PCMO, ATF, CVTF, Gear Oil, e-Axle/EV Driveline Fluid, Racing/Performance Oil, Others)

Segmentation 5: by Formulation Type

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Conventional

Blend

Full Synthetic

Others

Conventional Formulation to Dominate the North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type)

The conventional formulation segment leads the North America passenger vehicle lubricants aftermarket by formulation type due to the sizable legacy parc of older gasoline passenger cars, strong presence of value-driven consumer segments, and widespread availability through quick lube outlets, independent workshops, and mass retail formats. Many cost-sensitive owners continue to prioritize lower upfront service costs over extended drain benefits, which sustains the dominance of conventional oils in routine oil change volumes. However, the growing penetration of newer passenger car models with tighter OEM viscosity and performance specifications is steadily increasing the use of semi-synthetic and full synthetic oils, particularly in urban and suburban markets where customers are more receptive to premium maintenance propositions. Over the forecast period, tightening fuel economy and emissions norms, longer OEM-recommended drain intervals, and rising awareness of engine protection benefits are expected to structurally shift demand toward full synthetic formulations. By 2035, full synthetic oils are projected to emerge as the leading product category in value and increasingly in volume as well, supported by higher average selling prices, strong pull from dealership and branded service networks, and the gradual retirement of older vehicles designed around conventional oils. This transition will require lubricant suppliers to continuously upgrade additive packages, expand OEM approvals, and reposition their portfolios and channel strategies toward premium synthetic offerings that align with evolving passenger car technology in the region.

Segmentation 6: by Country

North America: U.S., Canada

The U.S. is positioned to lead the North America passenger vehicle lubricants

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aftermarket due to a combination of economic strength, technological innovation, policy support, and consumer behavior trends. As the largest contributor to the market, the U.S. automotive industry has several competitive advantages that will continue to position it as the dominant player in the region.

Demand - Drivers, Limitations, and Opportunities

Market Demand Drivers: Vehicle-Miles-Travelled (VMT) Recovery Supporting Demand Rebound

The recovery of vehicle-miles-travelled (VMT) in North America post-2022 continues to serve as a key driver for the passenger vehicle lubricants aftermarket, as elevated driving activity intensifies engine wear and underscores the need for regular lubricant maintenance to sustain vehicle reliability. After pandemic-induced travel disruptions, U.S. VMT demonstrated steady resurgence, with total mileage advancing one percent in 2024 over the previous year, reflecting normalized patterns in commuting, commerce, and recreation that place greater operational demands on passenger vehicle engines. This momentum aligns with per capita travel stabilizing near historical benchmarks, fostering a broader return to highway-dependent lifestyles that amplify exposure to road contaminants and thermal stresses. Consequently, heightened VMT accelerates the degradation of engine oils, compelling vehicle owners to prioritize aftermarket lubricants that offer superior detergency and thermal stability for optimal performance. In an environment of prolonged vehicle ownership, this driver enhances the appeal of advanced formulations capable of mitigating varnish buildup and oxidation in frequently used powertrains. North American passenger fleets, characterized by extended retention amid economic pressures, benefit from such interventions, as routine service intervals become essential to averting costly failures.

Market Challenges: Extended Oil Change Intervals Compressing Volumes

Extended oil change intervals represent a significant restraint for the North America passenger vehicle lubricants aftermarket, primarily by compressing volumes through reduced frequency of lubricant replacements. Original equipment manufacturers (OEMs) have adopted longer drain intervals to lower vehicle ownership costs and align with advancements in synthetic oil formulations, resulting in fewer aftermarket service visits. For instance, in 2023 and newer models, the majority of automakers recommend intervals of 5,000 to 15,000 miles until drain based on normal driving conditions, a shift that directly curtails demand for engine oils in the aftermarket segment. This trend, driven by improved engine designs and lubricant stability, leads to lower annual

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consumption per vehicle, challenging aftermarket suppliers reliant on routine maintenance cycles. The restraint intensifies as consumer behavior adapts to these extended schedules, with vehicle owners prioritizing convenience over frequent servicing. For instance, in 2023, the American Automobile Association reported that average new vehicle ownership costs reached $12,182 annually, a 13 percent rise from 2022, prompting OEMs to extend intervals further to mitigate maintenance expenses. Consequently, aftermarket volumes face compression, as fewer oil changes translate to diminished sales of both conventional and synthetic products. Oil companies, in response, have accelerated innovation; For instance, ExxonMobil's 2022 restructuring into focused business lines, including Product Solutions, emphasized high-performance lubricants capable of supporting these prolonged intervals.

Market Opportunities: Expansion into New Markets through E-Axle Thermal and Transmission Fluids

Expanding into new markets via e-axle thermal and transmission fluids presents a compelling growth opportunity within the North America passenger vehicle lubricants aftermarket. As automotive manufacturers accelerate electrification, the emergence of electronic drive units (e-axles) and integrated thermal-management systems introduces fresh application categories beyond traditional engine oils and ATFs. For instance, manufacturers are designing dedicated fluids for e-axles that combine gear-reduction lubrication, thermal conduction, and electrical insulation, all unique to electric-vehicle architectures. Leading lubricant suppliers are responding actively to this demand, too. Companies such as Shell plc are marketing specialized friction- and thermal-management e-fluid products in cooperation with OEMs.

How can this report add value to an organization?

Product/Innovation Strategy: In the North America passenger vehicle lubricants aftermarket, companies are adopting innovative product strategies to remain competitive, meet evolving consumer demands, and stay ahead of regulatory and technological trends. These strategies revolve around electric mobility, autonomous driving, connected technologies, and sustainability.

Growth/Marketing Strategy: The North America passenger vehicle lubricants aftermarket is experiencing significant transformations, driven by shifting consumer preferences, technological innovations, and regulatory changes. To maintain a competitive edge in such a dynamic environment, companies must implement effective growth and marketing strategies. These strategies focus on brand positioning,

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consumer engagement, innovative marketing approaches, and product differentiation.

Competitive Strategy: The North America passenger vehicle lubricants aftermarket is highly competitive, with numerous global and domestic players vying for market share. To maintain a strong position, automakers need to develop and execute well-rounded competitive strategies that address consumer demand, technological advancements, regulatory pressures, and market trends.

Research Methodology

Factors for Data Prediction and Modelling

The base currency considered for the market analysis is the US$. Currencies other than the US$ have been converted to the US$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major technological breakthroughs.

Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the North America passenger vehicle lubricants aftermarket.

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The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes has been explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Primary Research

The primary sources involve industry experts from the North America passenger vehicle lubricants aftermarket and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

validation and triangulation of all the numbers and graphs

validation of report segmentations and key qualitative findings

understanding the competitive landscape

validation of the numbers of various markets for the market type

percentage split of individual markets for geographical analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the data sources, the study has been undertaken with the help of other data sources and websites, such as the Government e-Marketplace (GeM).

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Secondary research has been done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include

- segmentations and percentage shares
- data for market value
- key industry trends of the top players in the market
- qualitative insights into various aspects of the market, key trends, and emerging areas of innovation
- quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled in the North America passenger vehicle lubricants aftermarket have been selected based on inputs gathered from primary experts and by analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in the North America passenger vehicle lubricants aftermarket are:

North America Passenger Vehicle Lubricants Aftermarket Provider

- Royal Purple
- Calumet, Inc.
- Chevron Corporation
- Valvoline
- Phillips 66 Company

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Petro-Canada Lubricants Inc.

HF Sinclair Corporation

Motul

Lucas Oil Products, Inc.

Red Line Synthetic Oil

AMSOIL INC.

LIQUI MOLY GmbH

BP p.l.c.

TotalEnergies

FUCHS

Idemitsu Kosan Co, Ltd.

ENEOS Corporation

Companies that are not a part of the aforementioned pool have been well represented across different sections of the report (wherever applicable).

North America Passenger Vehicle Lubricants Aftermarket Channel Operators and Distributors Snapshot

AutoZone, Inc.

O'Reilly Auto Parts

Carquest Auto Parts

WORLDPAC, LLC

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Genuine Parts Company

Walmart

Costco Wholesale Corporation

Sam's West Inc.

Amazon, Inc.

Turn 14 Distribution

Keystone Automotive Operations, Inc.

Motor State Distributing

Mighty Auto Parts

Highline Warren

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