

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

<https://marketpublishers.com/r/N63798A3E766EN.html>

Date: January 2026

Pages: 247

Price: US\$ 4,900.00 (Single User License)

ID: N63798A3E766EN

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

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)

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

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

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

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

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

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,

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.

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).

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

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

WORLD PAC, LLC

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

This report can be delivered within 1 working day.

Contents

Executive Summary
Scope and Definition

1 MARKET: INDUSTRY OUTLOOK

1.1 Trends: Current and Future Impact Assessment

1.1.1 Gasoline Specification Shift (ILSAC GF-6/API SP): Lower Viscosities, LSPI Control, and Synthetic Mix

1.1.2 Diesel Specification Updates (API CK-4/FA-4): Oxidation Stability, HTHS, and Drain-Interval Implications for Fleets

1.1.3 DIY-to-DIFM Migration Leading to Quick-Lube Network Expansion and Multi-Service Add-Ons

1.1.4 E-Fluids/E-Axle Lubricant Rise Within Driveline: Approvals Landscape and Service-Fill Opportunities

1.1.5 Vehicle-Miles-Traveled Normalization as the Demand Baseline

1.1.6 Omnichannel Growth: E-Commerce Assortment Breadth vs. MAP/Compliance

1.1.7 WD Consolidation and the Role of Program Oils/Private Label

1.2 Stakeholder Analysis

1.2.1 Use Case

1.2.1.1 Strategic Opportunity for Lubricant OEMs and Independent Service Centers: Premium Oil Bundling in the North America Passenger Vehicle Aftermarket

1.2.2 End User and Buying Criteria

1.3 Case Study Analysis

1.3.1 Parameter-Based Oil Filter Selection for High-Altitude Passenger Vehicles

1.3.1.1 Low Viscosity Engine Oils for Passenger Vehicles

1.4 Regulatory and Policy Impact Analysis

1.4.1 API/ILSAC Gasoline Categories (GF-6A/GF-6B, API SP)

1.4.2 HDEO (CK-4/FA-4) Specification

1.4.3 PQIA and Retailer Requirements

1.5 Supply Chain Overview

1.5.1 Key Players within the Supply Chain

1.5.2 Value Chain Analysis

1.6 Market Dynamics

1.6.1 Market Drivers

1.6.1.1 Vehicle-Miles-Traveled (VMT) Recovery Supporting Demand Rebound

1.6.1.2 Aging Vehicle Parc Driving Increased Aftermarket Lubricant Sales

1.6.1.3 Spec Upgrades across Oil Categories Generating Incremental Replacement

Demand

1.6.1.4 DIFM Convenience Attracting More Consumers toward Professional Service Channels

1.6.2 Market Challenges

1.6.2.1 Extended Oil Change Intervals Compressing Volumes

1.6.2.2 BEV Penetration in PCMO/ATF Pools Suppressing Conventional Fluid

Demand

1.6.2.3 Heightened Private-Label Competition Putting Pressure on Branded Players

1.6.3 Market Opportunities

1.6.3.1 Expansion into New Markets through E-Axle Thermal and Transmission Fluids

1.6.3.2 Growth Avenue from FA-4 Adoption in Newer Heavy-Duty Engines

1.6.3.3 Omnichannel Packaging Formats Unlocking New Shopper Touchpoints

2 APPLICATION

2.1 Application Summary

2.2 North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type)

2.2.1 Internal Combustion Engine (ICE) Vehicle

2.2.2 Electric Vehicle (EV)

2.2.2.1 Battery Electric Vehicle (BEV)

2.2.2.2 Hybrid Electric Vehicle (PHEV/HEV)

2.3 North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type)

2.3.1 DIY (Do-It-Yourself)

2.3.2 DIFM (Do-It-For-Me)

2.4 North America Passenger Vehicle Lubricants Aftermarket (Sales Channel by Product Type)

2.4.1 OEM Dealer

2.4.1.1 PCMO (Passenger Car Motor Oil)

2.4.1.2 ATF (Automatic Transmission Fluid)

2.4.1.3 CVTF (Continuously Variable Transmission Fluid)

2.4.1.4 Gear Oil (Differential/Axle Fluids)

2.4.1.5 e-Axle/EV Driveline Fluids

2.4.1.6 Racing/Performance Oil

2.4.1.7 Others

2.4.2 Quick Lube

2.4.2.1 PCMO (Passenger Car Motor Oil)

2.4.2.2 ATF (Automatic Transmission Fluid)

2.4.2.3 CVTF (Continuously Variable Transmission Fluid)

- 2.4.2.4 Gear Oil (Differential/Axle Fluids)
- 2.4.2.5 Others
- 2.4.3 Garage/Repair and Tire
 - 2.4.3.1 PCMO (Passenger Car Motor Oil)
 - 2.4.3.2 ATF (Automatic Transmission Fluid)
 - 2.4.3.3 CVTF (Continuously Variable Transmission Fluid)
 - 2.4.3.4 Gear Oil (Differential/Axle Fluids)
 - 2.4.3.5 e-Axle / EV Driveline Fluids
 - 2.4.3.6 Racing/Performance Oil
 - 2.4.3.7 Others
- 2.4.4 Auto-Parts Retail
 - 2.4.4.1 PCMO (Passenger Car Motor Oil)
 - 2.4.4.2 ATF (Automatic Transmission Fluid)
 - 2.4.4.3 CVTF (Continuously Variable Transmission Fluid)
 - 2.4.4.4 Gear Oil (Differential/Axle Fluids)
 - 2.4.4.5 Racing/Performance Oil
 - 2.4.4.6 Others
- 2.4.5 Mass Retail (Walmart/Costco/Sam's)
 - 2.4.5.1 PCMO (Passenger Car Motor Oil)
 - 2.4.5.2 ATF (Automatic Transmission Fluid)
 - 2.4.5.3 CVTF (Continuously Variable Transmission Fluid)
 - 2.4.5.4 Gear Oil (Differential/Axle Fluids)
 - 2.4.5.5 Racing/Performance Oil
 - 2.4.5.6 Others
- 2.4.6 E-Commerce/Online
 - 2.4.6.1 PCMO (Passenger Car Motor Oil)
 - 2.4.6.2 ATF (Automatic Transmission Fluid)
 - 2.4.6.3 CVTF (Continuously Variable Transmission Fluid)
 - 2.4.6.4 Gear Oil (Differential/Axle Fluids)
 - 2.4.6.5 Racing/Performance Oil
 - 2.4.6.6 Others
- 2.4.7 Others
 - 2.4.7.1 PCMO (Passenger Car Motor Oil)
 - 2.4.7.2 ATF (Automatic Transmission Fluid)
 - 2.4.7.3 CVTF (Continuously Variable Transmission Fluid)
 - 2.4.7.4 Gear Oil (Differential/Axle Fluids)
 - 2.4.7.5 e-Axle / EV Driveline Fluids
 - 2.4.7.6 Racing/Performance Oil
 - 2.4.7.7 Others

3 PRODUCTS

3.1 Product Summary

3.2 North America Passenger Vehicle Lubricants Aftermarket (by Product Type)

3.2.1 PCMO (Passenger Car Motor Oil)

3.2.2 HDEO (Heavy-Duty Engine Oil)

3.2.3 ATF (Automatic Transmission Fluid)

3.2.4 CVTF (Continuously Variable Transmission Fluid)

3.2.5 Gear Oil (Differential/Axle Fluids)

3.2.6 e-Axle/EV Driveline Fluids

3.2.7 Racing/Performance Oil

3.2.8 Others

3.3 North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type)

3.3.1 Conventional

3.3.2 Blend

3.3.3 Fully Synthetic

3.3.4 Others

4 NORTH AMERICA PASSENGER VEHICLE LUBRICANTS AFTERMARKET (BY COUNTRY)

4.1 Country Summary

4.2 North America

4.2.1 Markets

4.2.1.1 Regional Overview and Key Market Participants in North America

4.2.1.2 Driving Factors for Market Growth

4.2.1.3 Factors Challenging the Market

4.2.2 Application

4.2.2.1 North America Passenger Vehicle Lubricants Aftermarket by Propulsion Type

4.2.2.2 North America Passenger Vehicle Lubricants Aftermarket by Consumer Type

4.2.2.3 North America Passenger Vehicle Lubricants Aftermarket, Sales Channel by

Consumer Type

4.2.3 Product

4.2.3.1 North America Passenger Vehicle Lubricants Aftermarket by Product Type

4.2.3.2 North America Passenger Vehicle Lubricants Aftermarket by Formulation

Type

4.3 North America Passenger Vehicle Lubricants Aftermarket - by Country

4.4 U.S.

4.4.1 Markets

4.4.1.1 Country Overview and Key Market Participants in the U.S.

4.4.1.2 Driving Factors for Market Growth

4.4.1.3 Factors Challenging the Market

4.4.1.4 Regulatory Analysis

4.4.1.4.1 Environmental and Chemical Composition Regulations

4.4.1.4.2 Trade and Distribution Policies

4.4.1.4.3 Labeling Standards and Consumer Protection

4.4.2 Application

4.4.2.1 U.S. Passenger Vehicle Lubricants Aftermarket by Propulsion Type

4.4.2.2 U.S. Passenger Vehicle Lubricants Aftermarket by Consumer Type

4.4.2.3 U.S. Passenger Vehicle Lubricants Aftermarket (Sales Channel by Product Type)

4.4.3 Product

4.4.3.1 U.S. Passenger Vehicle Lubricants Aftermarket by Product Type

4.4.3.2 U.S. Passenger Vehicle Lubricants Aftermarket by Formulation Type

4.5 Canada

4.5.1 Markets

4.5.1.1 Country Overview and Key Market Participants in Canada

4.5.1.2 Driving Factors for Market Growth

4.5.1.3 Factors Challenging the Market

4.5.1.4 Regulatory Analysis

4.5.1.4.1 Environmental and Chemical Composition Regulations

4.5.1.4.2 Trade and Distribution Policies

4.5.1.4.3 Labeling Standards and Consumer Protection

4.5.2 Application

4.5.2.1 Canada Passenger Vehicle Lubricants Aftermarket by Propulsion Type

4.5.2.2 Canada Passenger Vehicle Lubricants Aftermarket by Consumer Type

4.5.2.3 Canada Passenger Vehicle Lubricants Aftermarket (Sales Channel by Product Type)

4.5.3 Product

4.5.3.1 Canada Passenger Vehicle Lubricants Aftermarket by Product Type

4.5.3.2 Canada Passenger Vehicle Lubricants Aftermarket by Formulation Type

5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

5.1 Next Frontiers

5.2 Geographic Assessment

5.3 Competitive Benchmarking

- 5.3.1 Strategic Initiatives, January 2022 – November 2025
- 5.3.2 Competitive Benchmarking Matrix
- 5.3.3 Competitive Advantages and Market Differentiators for Leading Companies
- 5.4 Company Profiles
 - 5.4.1 North American Lubricant Manufacturers
 - 5.4.1.1 Royal Purple
 - 5.4.1.2 Calumet, Inc.
 - 5.4.1.3 Chevron Corporation
 - 5.4.1.4 Valvoline
 - 5.4.1.5 Phillips 66 Company
 - 5.4.1.6 Petro-Canada Lubricants Inc.
 - 5.4.1.7 HF Sinclair Corporation
 - 5.4.1.8 Motul
 - 5.4.1.9 Lucas Oil Products, Inc.
 - 5.4.1.10 Red Line Synthetic Oil
 - 5.4.1.10.1 Overview
 - 5.4.1.10.2 Top Products/Product Portfolio
 - 5.4.1.10.3 Key Sales Channels
 - 5.4.1.10.4 Top Competitors
 - 5.4.1.10.5 Target Customers
 - 5.4.1.10.6 Key Personnel
 - 5.4.1.10.7 Analyst View
 - 5.4.1.11 AMSOIL INC.
 - 5.4.1.12 List of Other Key North American Lubricant Manufacturers
 - 5.4.2 Global Manufacturers
 - 5.4.2.1 LIQUI MOLY GmbH
 - 5.4.2.2 BP p.l.c.
 - 5.4.2.3 TotalEnergies
 - 5.4.2.4 FUCHS
 - 5.4.2.5 Idemitsu Kosan Co, Ltd.
 - 5.4.2.6 ENEOS Corporation
 - 5.4.2.7 List of Other Key Global/Other Regional Lubricant Manufacturers
 - 5.4.3 Channel Operators and Distributors Snapshot Company Profiles
 - 5.4.3.1 AutoZone, Inc.
 - 5.4.3.2 O'Reilly Auto Parts
 - 5.4.3.3 Carquest Auto Parts
 - 5.4.3.4 WORLD PAC, LLC
 - 5.4.3.5 Genuine Parts Company
 - 5.4.3.6 Walmart

- 5.4.3.7 Costco Wholesale Corporation
- 5.4.3.8 Sam's West, Inc.
- 5.4.3.9 Amazon, Inc.
- 5.4.3.10 Turn 14 Distribution
- 5.4.3.11 Keystone Automotive Operations, Inc.
- 5.4.3.12 Motor State Distributing
- 5.4.3.13 Mighty Auto Parts
- 5.4.3.14 Highline Warren
- 5.4.3.15 List of Other Key Operators and Distributors

6 GROWTH OPPORTUNITIES AND STRATEGIC RECOMMENDATIONS

- 6.1 Portfolio and Technology Opportunities
- 6.2 OEM, Factory-Fill, and Co-Branded Programs
- 6.3 Motorsports, Performance, and Brand Building
- 6.4 Distribution, Channel, and Aftermarket Expansion
- 6.5 Manufacturing, Supply Chain, and Footprint Optimization
- 6.6 Digital, Technical Support, and Customer Engagement
- 6.7 Strategic Partnerships and Merger and Acquisition (M&A) Options

7 RESEARCH METHODOLOGY

- 7.1 Data Sources
 - 7.1.1 Primary Data Sources
 - 7.1.2 Secondary Data Sources
 - 7.1.3 Data Triangulation
- 7.2 Market Estimation and Forecast

List Of Figures

LIST OF FIGURES

Figure 1: North America Passenger Vehicle Lubricants Aftermarket (by Scenario), \$Billion, 2025, 2030, and 2035

Figure 2: North America Passenger Vehicle Lubricants Aftermarket, 2024 and 2035

Figure 3: North America Market Snapshot, 2024

Figure 4: North America Passenger Vehicle Lubricants Aftermarket, \$Million, 2024 and 2035

Figure 5: North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), \$Million, 2024, 2030, and 2035

Figure 6: North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type), \$Million, 2024, 2030, and 2035

Figure 7: North America Passenger Vehicle Lubricants Aftermarket (by Sales Channel), \$Million, 2024, 2030, and 2035

Figure 8: North America Passenger Vehicle Lubricants Aftermarket (by Product Type), \$Million, 2024, 2030, and 2035

Figure 9: North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type), \$Million, 2024, 2030, and 2035

Figure 10: North America Passenger Vehicle Lubricants Aftermarket Segmentation

Figure 11: End User and Buying Criteria

Figure 12: Supply Chain with Key Players

Figure 13: Value Chain Analysis Snapshot

Figure 14: North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), Value, \$Million, 2024, 2029, and 2035

Figure 15: North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), Volume, Million Liters, 2024, 2029, and 2035

Figure 16: North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type), Value, \$Million, 2024, 2029, and 2035

Figure 17: North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type), Volume, Million Liters, 2024, 2029, and 2035

Figure 18: North America Passenger Vehicle Lubricants Aftermarket (by Sales Channel), Value, \$Million, 2024, 2029, and 2035

Figure 19: North America Passenger Vehicle Lubricants Aftermarket (by Sales Channel), Volume, Million Liters, 2024, 2029, and 2035

Figure 20: North America Passenger Vehicle Lubricants Aftermarket (Internal Combustion Engine (ICE) Vehicle), Value, \$Million, 2024-2035

Figure 21: North America Passenger Vehicle Lubricants Aftermarket (Internal

Combustion Engine (ICE) Vehicle), Volume, Million Liters, 2024-2035

Figure 22: North America Passenger Vehicle Lubricants Aftermarket (Electric Vehicle (EV)), Value, \$Million, 2024-2035

Figure 23: North America Passenger Vehicle Lubricants Aftermarket (Electric Vehicle (EV)), Volume, Million Liters, 2024-2035

Figure 24: North America Passenger Vehicle Lubricants Aftermarket (Battery Electric Vehicle (BEV)), Value, \$Million, 2024-2035

Figure 25: North America Passenger Vehicle Lubricants Aftermarket (Battery Electric Vehicle (BEV)), Volume, Million Liters, 2024-2035

Figure 26: North America Passenger Vehicle Lubricants Aftermarket (Hybrid Electric Vehicle (PHEV/HEV)), Value, \$Million, 2024-2035

Figure 27: North America Passenger Vehicle Lubricants Aftermarket (Hybrid Electric Vehicle (PHEV/HEV)), Volume, Million Liters, 2024-2035

Figure 28: North America Passenger Vehicle Lubricants Aftermarket (DIY (Do-It-Yourself)), Value, \$Million, 2024-2035

Figure 29: North America Passenger Vehicle Lubricants Aftermarket (DIY (Do-It-Yourself)), Volume, Million Liters, 2024-2035

Figure 30: North America Passenger Vehicle Lubricants Aftermarket (DIFM (Do-It-For-Me)), Value, \$Million, 2024-2035

Figure 31: North America Passenger Vehicle Lubricants Aftermarket (DIFM (Do-It-For-Me)), Volume, Million Liters, 2024-2035

Figure 32: North America Passenger Vehicle Lubricants Aftermarket (OEM Dealer), Value, \$Million, 2024-2035

Figure 33: North America Passenger Vehicle Lubricants Aftermarket (OEM Dealer), Volume, Million Liters, 2024-2035

Figure 34: North America Passenger Vehicle Lubricants Aftermarket (Quick Lube), Value, \$Million, 2024-2035

Figure 35: North America Passenger Vehicle Lubricants Aftermarket (Quick Lube), Volume, Million Liters, 2024-2035

Figure 36: North America Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire), Value, \$Million, 2024-2035

Figure 37: North America Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire), Volume, Million Liters, 2024-2035

Figure 38: North America Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail), Value, \$Million, 2024-2035

Figure 39: North America Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail), Volume, Million Liters, 2024-2035

Figure 40: North America Passenger Vehicle Lubricants Aftermarket (Mass Retail (Walmart/Costco/Sam's)), Value, \$Million, 2024-2035

Figure 41: North America Passenger Vehicle Lubricants Aftermarket (Mass Retail (Walmart/Costco/Sam's)), Volume, Million Liters, 2024-2035

Figure 42: North America Passenger Vehicle Lubricants Aftermarket (E-Commerce/Online), Value, \$Million, 2024-2035

Figure 43: North America Passenger Vehicle Lubricants Aftermarket (E-Commerce/Online), Volume, Million Liters, 2024-2035

Figure 44: North America Passenger Vehicle Lubricants Aftermarket (Others), Value, \$Million, 2024-2035

Figure 45: North America Passenger Vehicle Lubricants Aftermarket (Others), Volume, Million Liters, 2024-2035

Figure 46: North America Passenger Vehicle Lubricants Aftermarket (by Product Type), Value, \$Million, 2024, 2029, and 2035

Figure 47: North America Passenger Vehicle Lubricants Aftermarket (by Product Type), Volume, Million Liters, 2024, 2029, and 2035

Figure 48: North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type), Value, \$Million, 2024, 2029, and 2035

Figure 49: North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type), Volume, Million Liters, 2024, 2029, and 2035

Figure 50: North America Passenger Vehicle Lubricants Aftermarket (PCMO (Passenger Car Motor Oil)), Value, \$Million, 2024-2035

Figure 51: North America Passenger Vehicle Lubricants Aftermarket (PCMO (Passenger Car Motor Oil)), Volume, Million Liters, 2024-2035

Figure 52: North America Passenger Vehicle Lubricants Aftermarket (HDEO (Heavy-Duty Engine Oil)), Value, \$Million, 2024-2035

Figure 53: North America Passenger Vehicle Lubricants Aftermarket (HDEO (Heavy-Duty Engine Oil)), Volume, Million Liters, 2024-2035

Figure 54: North America Passenger Vehicle Lubricants Aftermarket (ATF (Automatic Transmission Fluid)), Value, \$Million, 2024-2035

Figure 55: North America Passenger Vehicle Lubricants Aftermarket (ATF (Automatic Transmission Fluid)), Volume, Million Liters, 2024-2035

Figure 56: North America Passenger Vehicle Lubricants Aftermarket (CVTF (Continuously Variable Transmission Fluid)), Value, \$Million, 2024-2035

Figure 57: North America Passenger Vehicle Lubricants Aftermarket (CVTF (Continuously Variable Transmission Fluid)), Volume, Million Liters, 2024-2035

Figure 58: North America Passenger Vehicle Lubricants Aftermarket (Gear Oil (Differential/Axle Fluids)), Value, \$Million, 2024-2035

Figure 59: North America Passenger Vehicle Lubricants Aftermarket (Gear Oil (Differential/Axle Fluids)), Volume, Million Liters, 2024-2035

Figure 60: North America Passenger Vehicle Lubricants Aftermarket (e-Axle/EV

Driveline Fluids), Value, \$Million, 2024-2035

Figure 61: North America Passenger Vehicle Lubricants Aftermarket (e-Axle/EV Driveline Fluids), Volume, Million Liters, 2024-2035

Figure 62: North America Passenger Vehicle Lubricants Aftermarket (Racing/Performance Oil), Value, \$Million, 2024-2035

Figure 63: North America Passenger Vehicle Lubricants Aftermarket (Racing/Performance Oil), Volume, Million Liters, 2024-2035

Figure 64: North America Passenger Vehicle Lubricants Aftermarket (Others), Value, \$Million, 2024-2035

Figure 65: North America Passenger Vehicle Lubricants Aftermarket (Others), Volume, Million Liters, 2024-2035

Figure 66: North America Passenger Vehicle Lubricants Aftermarket (Conventional), Value, \$Million, 2024-2035

Figure 67: North America Passenger Vehicle Lubricants Aftermarket (Conventional), Volume, Million Liters, 2024-2035

Figure 68: North America Passenger Vehicle Lubricants Aftermarket (Blend), Value, \$Million, 2024-2035

Figure 69: North America Passenger Vehicle Lubricants Aftermarket (Blend), Volume, Million Liters, 2024-2035

Figure 70: North America Passenger Vehicle Lubricants Aftermarket (Fully Synthetic), Value, \$Million, 2024-2035

Figure 71: North America Passenger Vehicle Lubricants Aftermarket (Fully Synthetic), Volume, Million Liters, 2024-2035

Figure 72: North America Passenger Vehicle Lubricants Aftermarket (Others), Value, \$Million, 2024-2035

Figure 73: North America Passenger Vehicle Lubricants Aftermarket (Others), Volume, Million Liters, 2024-2035

Figure 74: U.S. Passenger Vehicle Lubricants Aftermarket, \$Million, 2024-2035

Figure 75: Canada Passenger Vehicle Lubricants Aftermarket, \$Million, 2024-2035

Figure 76: Next Frontier

Figure 77: Strategic Initiatives, January 2022-November 2025

Figure 78: Competitive Benchmarking Matrix, 2024

Figure 79: Strategic Recommendations for ENEOS Corporation in North America Passenger Vehicle Lubricants Aftermarket

Figure 80: Data Triangulation

Figure 81: Top-Down and Bottom-Up Approach

Figure 82: Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1: Market Snapshot

Table 2: Competitive Landscape Snapshot

Table 3: Trends: Current and Future Impact Assessment

Table 4: API/ILSAC Gasoline Categories (GF-6A/GF-6B, API SP)

Table 5: HDEO (CK-4/FA-4) Specification

Table 6: PQIA and Retailer Requirements

Table 7: Supply Chain Key Players in the U.S.

Table 8: Key Players by Sales Channel

Table 9: Drivers, Challenges, and Opportunities, 2025-2035

Table 10: North America Passenger Vehicle Lubricants Aftermarket (by Country), \$Million, 2024-2035

Table 11: North America Passenger Vehicle Lubricants Aftermarket (by Country), Million Liters, 2024-2035

Table 12: North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), \$Million, 2024-2035

Table 13: North America Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), Million Liters, 2024-2035

Table 14: North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type), \$Million, 2024-2035

Table 15: North America Passenger Vehicle Lubricants Aftermarket (by Consumer Type), Million Liters, 2024-2035

Table 16: North America Passenger Vehicle Lubricants Aftermarket (by Sales Channel), \$Million, 2024-2035

Table 17: North America Passenger Vehicle Lubricants Aftermarket (by Sales Channel), Million Liters, 2024-2035

Table 18: North America Passenger Vehicle Lubricants Aftermarket (OEM Dealer by Product Type), \$Million, 2024-2035

Table 19: North America Passenger Vehicle Lubricants Aftermarket (OEM Dealer by Product Type), Million Liters, 2024-2035

Table 20: North America Passenger Vehicle Lubricants Aftermarket (Quick Lube by Product Type), \$Million, 2024-2035

Table 21: North America Passenger Vehicle Lubricants Aftermarket (Quick Lube by Product Type), Million Liters, 2024-2035

Table 22: North America Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire by Product Type), \$Million, 2024-2035

Table 23: North America Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire by Product Type), Million Liters, 2024-2035

Table 24: North America Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail by Product Type), \$Million, 2024-2035

Table 25: North America Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail by Product Type), Million Liters, 2024-2035

Table 26: North America Passenger Vehicle Lubricants Aftermarket (Mass Retail (Walmart/Costco/Sam's) by Product Type), \$Million, 2024-2035

Table 27: North America Passenger Vehicle Lubricants Aftermarket (by Mass Retail (Walmart/Costco/Sam's) by Product Type), Million Liters, 2024-2035

Table 28: North America Passenger Vehicle Lubricants Aftermarket (E-commerce/Online by Product Type), \$Million, 2024-2035

Table 29: North America Passenger Vehicle Lubricants Aftermarket (E-commerce/Online by Product Type), Million Liters, 2024-2035

Table 30: North America Passenger Vehicle Lubricants Aftermarket (Others by Product Type), \$Million, 2024-2035

Table 31: North America Passenger Vehicle Lubricants Aftermarket (Others by Product Type), Million Liters, 2024-2035

Table 32: North America Passenger Vehicle Lubricants Aftermarket (by Product Type), \$Million, 2024-2035

Table 33: North America Passenger Vehicle Lubricants Aftermarket (by Product Type), Million Liters, 2024-2035

Table 34: North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type), \$Million, 2024-2035

Table 35: North America Passenger Vehicle Lubricants Aftermarket (by Formulation Type), Million Liters, 2024-2035

Table 36: U.S. Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), \$Million, 2024-2035

Table 37: U.S. Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), Million Liters, 2024-2035

Table 38: U.S. Passenger Vehicle Lubricants Aftermarket (by Consumer Type), \$Million, 2024-2035

Table 39: U.S. Passenger Vehicle Lubricants Aftermarket (by Consumer Type), Million Liters, 2024-2035

Table 40: U.S. Passenger Vehicle Lubricants Aftermarket (by Sales Channel), \$Million, 2024-2035

Table 41: U.S. Passenger Vehicle Lubricants Aftermarket (by Sales Channel), Million Liters, 2024-2035

Table 42: U.S. Passenger Vehicle Lubricants Aftermarket (OEM Dealer by Product

Type), \$Million, 2024-2035

Table 43: U.S. Passenger Vehicle Lubricants Aftermarket (OEM Dealer by Product Type), Million Liters, 2024-2035

Table 44: U.S. Passenger Vehicle Lubricants Aftermarket (Quick Lube by Product Type), \$Million, 2024-2035

Table 45: U.S. Passenger Vehicle Lubricants Aftermarket (Quick Lube by Product Type), Million Liters, 2024-2035

Table 46: U.S. Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire by Product Type), \$Million, 2024-2035

Table 47: U.S. Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire by Product Type), Million Liters, 2024-2035

Table 48: U.S. Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail by Product Type), \$Million, 2024-2035

Table 49: U.S. Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail by Product Type), Million Liters, 2024-2035

Table 50: U.S. Passenger Vehicle Lubricants Aftermarket (Mass Retail (Walmart/Costco/Sam's) by Product Type), \$Million, 2024-2035

Table 51: U.S. Passenger Vehicle Lubricants Aftermarket (by Mass Retail (Walmart/Costco/Sam's) by Product Type), Million Liters, 2024-2035

Table 52: U.S. Passenger Vehicle Lubricants Aftermarket (E-commerce/Online by Product Type), \$Million, 2024-2035

Table 53: U.S. Passenger Vehicle Lubricants Aftermarket (E-commerce/Online by Product Type), Million Liters, 2024-2035

Table 54: U.S. Passenger Vehicle Lubricants Aftermarket (Others by Product Type), \$Million, 2024-2035

Table 55: U.S. Passenger Vehicle Lubricants Aftermarket (Others by Product Type), Million Liters, 2024-2035

Table 56: U.S. Passenger Vehicle Lubricants Aftermarket (by Product Type), \$Million, 2024-2035

Table 57: U.S. Passenger Vehicle Lubricants Aftermarket (by Product Type), Million Liters, 2024-2035

Table 58: U.S. Passenger Vehicle Lubricants Aftermarket (by Formulation Type), \$Million, 2024-2035

Table 59: U.S. Passenger Vehicle Lubricants Aftermarket (by Formulation Type), Million Liters, 2024-2035

Table 60: Canada Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), \$Million, 2024-2035

Table 61: Canada Passenger Vehicle Lubricants Aftermarket (by Propulsion Type), Million Liters, 2024-2035

Table 62: Canada Passenger Vehicle Lubricants Aftermarket (by Consumer Type), \$Million, 2024-2035

Table 63: Canada Passenger Vehicle Lubricants Aftermarket (by Consumer Type), Million Liters, 2024-2035

Table 64: Canada Passenger Vehicle Lubricants Aftermarket (by Sales Channel), \$Million, 2024-2035

Table 65: Canada Passenger Vehicle Lubricants Aftermarket (by Sales Channel), Million Liters, 2024-2035

Table 66: Canada Passenger Vehicle Lubricants Aftermarket (OEM Dealer by Product Type), \$Million, 2024-2035

Table 67: Canada Passenger Vehicle Lubricants Aftermarket (OEM Dealer by Product Type), Million Liters, 2024-2035

Table 68: Canada Passenger Vehicle Lubricants Aftermarket (Quick Lube by Product Type), \$Million, 2024-2035

Table 69: Canada Passenger Vehicle Lubricants Aftermarket (Quick Lube by Product Type), Million Liters, 2024-2035

Table 70: Canada Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire by Product Type), \$Million, 2024-2035

Table 71: Canada Passenger Vehicle Lubricants Aftermarket (Garage/Repair and Tire by Product Type), Million Liters, 2024-2035

Table 72: Canada Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail by Product Type), \$Million, 2024-2035

Table 73: Canada Passenger Vehicle Lubricants Aftermarket (Auto-Parts Retail by Product Type), Million Liters, 2024-2035

Table 74: Canada Passenger Vehicle Lubricants Aftermarket (Mass Retail (Walmart/Costco/Sam's) by Product Type), \$Million, 2024-2035

Table 75: Canada Passenger Vehicle Lubricants Aftermarket (by Mass Retail (Walmart/Costco/Sam's) by Product Type), Million Liters, 2024-2035

Table 76: Canada Passenger Vehicle Lubricants Aftermarket (E-commerce/Online by Product Type), \$Million, 2024-2035

Table 77: Canada Passenger Vehicle Lubricants Aftermarket (E-commerce/Online by Product Type), Million Liters, 2024-2035

Table 78: Canada Passenger Vehicle Lubricants Aftermarket (Others by Product Type), \$Million, 2024-2035

Table 79: Canada Passenger Vehicle Lubricants Aftermarket (Others by Product Type), Million Liters, 2024-2035

Table 80: Canada Passenger Vehicle Lubricants Aftermarket (by Product Type), \$Million, 2024-2035

Table 81: Canada Passenger Vehicle Lubricants Aftermarket (by Product Type), Million

Liters, 2024-2035

Table 82: Canada Passenger Vehicle Lubricants Aftermarket (by Formulation Type), \$Million, 2024-2035

Table 83: Canada Passenger Vehicle Lubricants Aftermarket (by Formulation Type), Million Liters, 2024-2035

Table 84: Analysis on Competitive Advantages and Market Differentiators for Key Leading Companies

Table 85: List of Other Key North American Lubricant Manufacturers

Table 86: List of Other Key Global/Other Regional Lubricant Manufacturers

Table 87: List of Other Key Operators and Distributors

I would like to order

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

Product link: <https://marketpublishers.com/r/N63798A3E766EN.html>

Price: US\$ 4,900.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/N63798A3E766EN.html>