

Indian Automotive and Industrial Lubricants Market: Trends & Opportunities (2014-19)

<https://marketpublishers.com/r/I71F870E572EN.html>

Date: May 2014

Pages: 82

Price: US\$ 800.00 (Single User License)

ID: I71F870E572EN

Abstracts

The report titled “Indian Automotive and Industrial Lubricants Market: Trends & Opportunities (2014-2019)” provides an insight into the lubricants sector in India with a special focus on sub-segments like automotive and industrial lubricants. The report also includes the production and consumption trend, market value, segmentation on various parameters and distribution structure of the Indian lubricants sector. It also discusses key growth drivers and major challenges faced by lubricants industry in India. Further, key manufacturers of lubricants like Castrol India, HPCL, Gulf Oil and Indian Oil are profiled in the report.

Segments Coverage

Automotive Lubricants

Industrial Lubricants

Company Coverage

Castrol India Limited

Hindustan Petroleum Corporation Limited (HPCL)

Gulf Oil Corporation Limited (GOCL)

Indian Oil Corporation Limited (IOCL)

Executive Summary

India is the fifth largest lubricant market globally in volume terms behind the US, China, Russia and Japan. India is a net base oil deficit market and many additives used in lubricants are mostly imported. Volume consumption of lubricants in India has consistently declined over past few years as a result of improving lubricant and engine quality. In addition the year 2013 was accompanied by slower GDP growth rate and subdued industrial activity that also affected the industry margins.

The lubricants usage can be divided in two key segments – Automotive and Industrial. The demand for automotive lubricants in India is driven by growth in vehicle population and the consumption of industrial lubricants is highly correlated with Index of Industrial Production (IIP). Automotive lubricants typically are higher margin products compared to industrial lubricants. Majority of automotive lubricants demand is derived from commercial vehicles (CVs) and tractors, largely dominated by diesel engines. Process oils are the biggest contributor within industrial lubes.

In the Indian market, lubricants are sold broadly through three channels- Original Equipment Manufacturers (OEMs), petrol pumps and bazaar/retail trade. Bazaar trade is the most profitable amongst the distribution channels and consists of spare part shops, dedicated lubricant dealers, mechanic workshops and service centers.

The lubricants industry in India is dominated by national oil companies namely IOC, BPCL and HPCL that account for almost half of market share. Rest of the market includes private multinationals like Shell, Exxon Mobil, Total and numerous smaller and loyal players.

Contents

1. EXECUTIVE SUMMARY

2. LUBRICANTS AND GREASES

- 2.1 Overview
- 2.2 Types of Lubricants
- 2.3 Base Oil

3. INDIAN LUBRICANTS SECTOR

- 3.1 Evolvement of Lubricants Industry
- 3.2 Production and Consumption Trend
- 3.3 Market Size by Value
- 3.4 Import and Export Trends
 - 3.4.1 By Quantity
 - 3.4.2 By Value
- 3.5 Segmentation by End-Use
- 3.6 Market Share by Players

4. INDIAN AUTOMOTIVE LUBRICANTS MARKET

- 4.1 Market Size
- 4.2 Product- Wise Segmentation
- 4.3 Vehicle-Wise Segmentation
- 4.4 Usage of Lube Oils across Vehicles
- 4.5 Distribution Channels
- 4.6 Pricing of Automotive Lubricants
- 4.7 Automobile and Auto Component Industry
- 4.8 Market Drivers & Trends
 - 4.8.1 Preference for Premium Quality Lubes
 - 4.8.2 Demand for Synthetic and Semi-Synthetic Lubes
 - 4.8.3 Stricter Emission Standards
 - 4.8.4 Automobile Volume Growth
 - 4.8.5 Demand from Rural Markets

5. INDIAN INDUSTRIAL LUBRICANTS MARKET

- 5.1 Market Size
- 5.2 Category Wise Segmentation
- 5.3 End Markets Segmentation
- 5.4 Industrial Sector in India
- 5.5 Market Trends and Drivers
 - 5.5.1 Momentum in Manufacturing Activity
 - 5.5.2 Initiatives by Government of India

6. KEY ISSUES: INDIAN LUBRICANTS INDUSTRY

- 6.1 Volatility in Input Costs
- 6.2 Decline in Consumption Volume
- 6.3 Counterfeit or Spurious Lubricants

7. COMPETITIVE LANDSCAPE: INDIAN LUBRICANTS INDUSTRY

- 7.1 Automotive Lubricants Market Players
- 7.2 Industrial Lubricants Market Players

8. COMPANY PROFILES: INDIAN LUBRICANTS INDUSTRY

- 8.1 Castrol India Limited (CIL)
 - 8.1.1 Business Description
 - 8.1.2 Financial Overview
 - 8.1.3 Business Strategies
- 8.2 Hindustan Petroleum Corporation Limited (HPCL)
 - 8.2.1 Business Description
 - 8.2.2 Financial Overview
 - 8.2.3 Business Strategies
- 8.3 Gulf Oil Corporation Limited (GOCL)
 - 8.3.1 Business Description
 - 8.3.2 Financial Overview
 - 8.3.3 Business Strategies
- 8.4 Indian oil Corporation Limited (IOCL)
 - 8.4.1 Business Description
 - 8.4.2 Financial Overview
 - 8.4.3 Business Strategies

List Of Tables

LIST OF TABLES AND FIGURES

- Figure 1: Representation of Process from Base Stock to Finished Lubricant
- Figure 2: Global Base Oil Production Capacity by Types, 2009 vs 2012
- Figure 3: Evolvement of Indian Lubricants Sector
- Figure 4: Production and Consumption Volume of Lubricants in India, 2008-09 to 2013-14, (Thousand MT)
- Figure 5: Consumption Share of Lubricants & Greases Out of Total Petroleum Products, 2013-14
- Figure 6: Forecast – Demand of Lubricants by Volume in India, 2014-15 to 2018-19 (Thousand MT)
- Figure 7: Indian Lubricants Market Size by Value in US\$ Billion: 2009-10 to 2012-13
- Figure 8: Yearly Wholesale Price Index of Lubricants – India, 2007-08 to 2012-13 (Base Year 2004-05=100)
- Figure 9: Import and Exports of Lubricants in India by Volume, 2008-2009 to 2013-14 (Thousands MT)
- Figure 10: Import and Exports of Lubricants in India by Value, 2008-2009 to 2013-14 (US\$ Million)
- Figure 11: Indian Lubricants Market Segmentation by End Use, FY13
- Figure 12: Indian Lubricants Sector - Market Shares by Players, FY13
- Figure 13: Automotive Lubricants Market Size, 2007-2013 (Million Liters)
- Figure 14: Gross Margins for Sub-Categories Within Automotive Segment, 2013 (US\$/Liter)
- Figure 15: Automotive Lubricants by Product Categories, 2013
- Figure 16: Vehicle-Wise Segmentation of Automotive Lubricants Market, 2013
- Figure 17: Share of Lubricants within Commercial Vehicle Segment, 2013
- Figure 18: Distribution Channel Break-up for Commercial Vehicle Lubricant Segment, 2013
- Figure 19: Distribution Break-up for Passenger Cars and 2-Wheelers, 2013
- Figure 20: Pricing Comparison of Passenger Car Oil 15W40, 2013 (US\$/Liter)
- Figure 21: Pricing Comparison for Brake Oils, 2013 (US\$/Liter)
- Figure 22: Pricing Comparison of 2 Wheeler Engine Oil 20W40, 2013 (US\$/Liter)
- Figure 23: Pricing Comparison of Commercial & Heavy Duty Vehicle Oil 20W40, 2013 (US\$/Liter)
- Figure 24: Pricing Comparison for Commercial and Heavy Duty Vehicle Oil 15W40, 2013 (US\$/Liter)
- Figure 25: Pricing Comparison for Gear Oils, 2013 (US\$/Liter)

Figure 26: Production of Passenger and Commercial Vehicles in Thousand Units (2011-2012 vs 2012-2013)

Figure 27: Sales of Passenger and Commercial Vehicles in Thousand Units (2011-2012 vs 2012-2013)

Figure 28: Turnover of Auto Component Industry in India in US\$ Billion (2008-2009 to 2020-2021F)

Figure 29: Breakup of Auto Components Industry by Product Category (2012-2013)

Figure 30: Export and Import Value of Auto Components in US\$ Billion (2008-09 to 2012-13)

Figure 31: Share of Engine Oils in Passenger/2Wheeler category, 2007-2013 (%)

Figure 32: Share of Engine Oils in Commercial Vehicles category, 2007-2013 (%)

Figure 33: Forecast - Production of Passenger and Commercial Vehicles, 2012-13 to 2020-21 (In number of Units)

Figure 34: Consumption of Industrial Lubricants by Volume, 2008-09 to 2013-14 (In Thousand MT)

Figure 35: Industry Lubricants - Category Wise Split (2013)

Figure 36: End Markets Segmentation of Industrial Lubricants, 2013

Figure 37: Growth Rate of GDP at Factor Cost (at 2004-2005) Prices in % (2007-08 to 2013-14)

Figure 38: Sectoral Share in GDP at Constant (2004-2005) Prices in % (2013-14)

Figure 39: Yearly Inflation and Wholesale Price Index (Base Year: 2004-2005=100)

Figure 40: Brent Crude Oil Prices in US\$ per Barrel (2007-2013)

Figure 41: Lubricant Use per vehicle in India in Liters/vehicle/annum (FY07-FY14)

Figure 42: Shares of Indian Automotive Lubricants Market Players, 2013

Figure 43: Market Shares of Industrial Lubricants by Players, 2013

Figure 44: Castrol India Business Segmentation by Revenue, 2013

Figure 45: Castrol India Net Revenues by Value and Volume, 2007-2013

Figure 46: HPCL – Business Segmentation by Sales Volume, 2012-13

Figure 47: HPCL – Lubes and Greases Sales by Volume, 2008-09 to 2012-13 (Thousand Tonnes)

Figure 48: GOCL- Business Segmentation by Value, 2013-14

Figure 49: GOCL- Revenue from Lubricants Business Division, 2008-09 to 2013-14 (US\$ Million)

Figure 50: IOCL- Domestic Production Volume of Business Segments, 2008-09 to 2012-13 (Million Tonnes)

Table 1: Upcoming Group II and III Capacity Additions in 2014

Table 2: Lube Usage across Vehicles in Urban and Semi Urban Areas, 2013

Table 3: Distribution Channels by Type of Vehicles

Table 4: Margin Profile of Synthetic Lubricants

Table 5: Emission Standard Implementation in India

Table 6: Growth Rate of GDP at Factor Cost (at 2004-2005) Prices by Sector in %

Table 7: Monthly Growth Rates of Index of Industrial Production- Broad Sectors (Base: 2004-2005=100) (Year-on-year %)

Table 8: Growth Rate of Core Industries in % - (2008-09 to 2013-14)

Table 9: Performance of Manufacturing Sector by Categories March 2014 (in %)

I would like to order

Product name: Indian Automotive and Industrial Lubricants Market: Trends & Opportunities (2014-19)

Product link: <https://marketpublishers.com/r/I71F870E572EN.html>

Price: US\$ 800.00 (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/I71F870E572EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970