

China Automotive Chemicals Industry Report, 2011-2012

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Abstracts

Thanks to the boom of automotive manufacturing industry, China has become one of the world's important automotive chemicals producers and consumers. Automotive chemicals mainly consist of five varieties, namely, chemicals for lubrication, chemicals for cleaning, chemicals for protection, automotive coating and adhesives. Of these, automotive lubricant takes the lion's share in the automotive chemicals consumption market, with the apparent consumption in 2011 hitting 4.76 million tons approximately.

The automotive OEM/OES market is the competitive emphasis of automotive lubricant market, heavily depending on the auto manufacturers' acceptance to lubricant brands. China currently has around 4,000 lubricant manufacturers, most of which feature small scale and have no access to the automotive lubricant market with demanding quality requirements. In China's OEM/OES market, although European and American auto manufacturers prefer European and American lubricant brands including Castrol, Shell, Fuchs and Mobil, products made by state-run enterprises, like Great Wall Lubricant of Sinopec, have won acclaims from many domestic and foreign auto brands. Nevertheless, lubricants for Japanese auto brands are mainly supplied by Japanese lubricant producers such as ENEOS and Idemitsu.

In China, Sinopec (Great Wall Lubricant) and CNPC (Kunlun Lubricant) are major suppliers of automotive lubricant, accounting for 60% of the market. However, transnational enterprises firmly seize the lion's share and gain high profits in the medium and high-end automotive lubricant market by virtue of advanced technology and good brand reputation. In addition, private businesses and joint ventures including JiangSu Lopal Petrochemical, COPTON, Guangdong Delian Group win some market share by merit of high-quality service and professional technical support.?

The report highlights the following aspects:

Status quo, competition pattern and international market environment of China's automotive chemicals industry;

Influence of upstream industries including base oil, ethylene glycol and additives as well as downstream auto industry on China's automotive chemicals market;

Status quo and supply & demand of market segments such as automotive lubricant, cleaning & maintenance supplies, automotive coating and adhesives;

Operation of 13 automotive chemicals suppliers including Shell, BP, CNPC (Kunlun), Sinopec (Great Wall) and Guangdong Delian Group, and their automotive chemicals business development in China.

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