

China Lubricant Industry Report, 2013-2016

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Abstracts

Amid the slow growth of the global economy, although China's automobile output and ownership maintain rapid growth, the development of construction machinery manufacturing industry, transportation industry, construction industry and other industries slows down, which greatly depresses the boom of Chinese lubricant market. In 2013, China's lubricant output and sales volume fell sharply, wherein the output plunged by 30.2% year on year to 5,896,900 tons.

Affected by the distribution of resources, China lubricant industry is featured with apparent regional characteristics. Production areas mainly concentrate in East China, Northeast China and North China. In 2013, Liaoning, Shandong, Shanghai and Guangdong ranked the top four Chinese provinces by lubricant output. Particularly, Liaoning produced 1,391,100 tons, accounting for 23.8% of the national output.

By the end of 2013, there had been over 4,000 Chinese lubricant production enterprises. State-owned brands represented by Great Wall (Sinopec) and Kunlun (CNPC) as well as foreign brands including Shell, Mobil, BP, FUCHS and Total occupied most share of Chinese lubricant market. In 2013, Great Wall and Kunlun seized 51.2% market share together, while foreign companies grasped 29.9%.

At the same time, Chinese private lubricant companies also showed their strengths to take places in the fiercely competitive Chinese lubricant market, such as Delian Group, Tech petrochemical and Sure Energy Tech.

Delian Group has established long-term stable cooperative relations with upstream and downstream enterprises through "parts production bases near downstream vehicle plants". Currently, the company has four bases in Changchun, Shanghai, Chengdu and Foshan, and has become the designated lubricant supplier of Shanghai Volkswagen, FAW-Volkswagen, Shanghai GM and many other well-known automakers.

Gaoke Petrochemical, one of important suppliers of transformer oil, serves XCMG, Qianjiang Electric, Shenda Electric and CNC Electric. Through the elimination of backward capacity, equipment modification, building of new plants and other measures, the company's total lubricant capacity amounted to 121,600 tons at the end of 2013. But due to the decreasing demand for downstream transformers and other factors, the company's capacity utilization rate was only 80.6% at that time.

The report highlights:

Market supply & demand, competition pattern, import & export of China lubricant industry;

Market supply & demand, competition pattern, import & export of raw materials (base oil and additive) of China lubricant industry;

Status quo, policies and regulations, regeneration projects, supply and demand of China waste lubricant recycling market;

Operation and lubricant business of 8 global and 8 Chinese lubricant companies.

In recent years, China has attached more importance to the recycling of waste lubricant, and issued a series of favorable policies. However, China only recycles and reuses 6%-8% of lubricant. In theory, China's annual output of waste lubricant hit 3 million tons or more, embodying huge development potentials. At present, a number of waste lubricant regeneration projects are under construction or go into operation, such as Baosteel's 7,000 t/a waste lubricant project, Fujian Sanming Steel's waste lubricant regeneration project, Tangshan You Yi Sheng Xing's 60,000 t/a waste lubricant regeneration project.

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