

Automotive Passenger Cars Engine Oil Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Grade (Synthetic, Semi Synthetic and Minerals), By Demand Category (OEM, Aftermarket) By Region, Competition, 2018-2028

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Abstracts

Global Automotive Passenger Cars Engine Oil Market has valued at USD 32 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.9% through 2028. The Global Automotive Passenger Cars Engine Oil Market is a dynamic and vital sector within the automotive industry, playing a pivotal role in ensuring the efficient operation and longevity of passenger vehicles worldwide. These engine oils are meticulously engineered to meet the evolving demands of modern engines, which are continually striving for greater performance, reduced emissions, and enhanced fuel efficiency. Key trends in this market include the shift towards low-viscosity oils to meet stringent emissions regulations and improve mileage, the rise of synthetic and semi-synthetic oils for superior engine protection, and the growing importance of OEM-specific engine oil recommendations to optimize performance. Challenges include the need to adapt to a rapidly diversifying range of powertrains, cater to consumer preferences for extended oil change intervals, and address increasing demands for environmentally responsible products. Furthermore, as automotive engines continue to evolve with advanced technologies, engine oil manufacturers must remain at the forefront of innovation to deliver products that not only meet the demands of today's engines but also anticipate the requirements of the next generation of vehicles. In essence, the Global Automotive Passenger Cars Engine Oil Market is a dynamic and ever-evolving ecosystem, where innovation, regulation compliance, and environmental responsibility converge to support the efficient and sustainable operation of passenger vehicles worldwide.

Key Market Drivers

Stringent Emissions Regulations and Fuel Efficiency Imperatives

The foremost driver in the passenger car engine oil market is the ever-increasing pressure to adhere to stringent emissions regulations and achieve higher fuel efficiency standards. Governments worldwide are imposing strict emissions limits to combat climate change, which directly impacts the automotive industry. As a result, automakers are developing engines with smaller displacements, turbocharging, and direct fuel injection to reduce emissions and improve fuel efficiency. These advanced engines demand high-quality engine oils with lower viscosities that can reduce friction and optimize performance. Consequently, engine oil manufacturers are continuously innovating their formulations to meet these requirements, giving rise to the demand for low-viscosity, eco-friendly engine oils.

Vehicle Electrification and Hybridization

The proliferation of electric vehicles (EVs) and hybrid electric vehicles (HEVs) is reshaping the automotive landscape. While these vehicles use less traditional engine oil, they still rely on lubricants for various components, such as transmissions, differentials, and even some hybrid engines. Moreover, the transition to electrified powertrains doesn't happen overnight, as internal combustion engine (ICE) vehicles will coexist with EVs and HEVs for some time. This complex scenario necessitates engine oil manufacturers to diversify their product portfolios to serve both traditional and alternative powertrains. As the electrification trend continues to gain momentum, the market for specialized lubricants for EVs and HEVs is poised for growth.

Rising Vehicle Ownership and Mileage

The global rise in vehicle ownership, coupled with increased annual mileage, is another significant driver of the passenger car engine oil market. As the global population grows and more individuals enter the middle class, more people have the means to own and operate vehicles. This trend results in higher wear and tear on vehicle engines, leading to more frequent oil changes. Additionally, with greater awareness of the importance of vehicle maintenance for preserving resale value and longevity, consumers are increasingly mindful of maintaining their vehicles in top condition. Consequently, this ongoing increase in vehicle ownership and mileage ensures a sustained demand for engine oils, especially in emerging markets where the automotive industry is experiencing rapid growth.

Advanced Engine Technologies

Automotive manufacturers are relentlessly pushing the boundaries of engine technology to enhance performance, reduce emissions, and meet stringent regulatory standards. These advancements include innovations such as turbocharging, direct fuel injection, variable valve timing, and cylinder deactivation. While these technologies contribute to more efficient engines, they also pose greater demands on engine oils. Modern engine oils must possess superior thermal stability, oxidation resistance, and enhanced detergent-dispersant properties to protect engines operating under higher temperatures and pressures. Engine oil manufacturers are responding by developing formulations tailored to the specific needs of these advanced engines, ensuring that they remain well-lubricated and protected.

Expanding Middle-Class Population in Emerging Markets

Emerging markets are witnessing a remarkable surge in vehicle ownership, driven by the growing middle-class population. As individuals in these markets transition from two-wheelers to four-wheelers, the demand for passenger cars and related automotive products, including engine oils, is experiencing exponential growth. The significance of efficient and cost-effective engine oils is particularly pronounced in these regions, where consumers aim to maintain their vehicles for extended periods while ensuring optimal performance and fuel economy. Engine oil manufacturers are actively targeting these emerging markets, recognizing the immense growth potential they offer. By tailoring products to meet the unique demands of these regions, manufacturers are contributing to the rapid expansion of the passenger car engine oil market.

Key Market Challenges

Evolving Emissions Regulations and Sustainability Pressure

One of the foremost challenges confronting the market is the ever-evolving landscape of emissions regulations and the mounting pressure for sustainability. Governments worldwide are tightening emissions standards to combat climate change, prompting automakers to develop cleaner and more fuel-efficient engines. This shift translates to reduced carbon emissions but also places greater demands on engine oil. Manufacturers must create low-viscosity, eco-friendly engine oils that reduce friction and contribute to lower emissions while still meeting the stringent performance requirements of modern engines. Navigating this intricate regulatory landscape and

developing engine oils that strike a balance between environmental responsibility and performance is a persistent challenge.

Diversification of Powertrains and Lubricant Requirements

The increasing diversity of powertrains in the automotive industry presents a significant challenge for engine oil manufacturers. While internal combustion engines (ICEs) continue to dominate, the market is witnessing a surge in hybrid electric vehicles (HEVs), plug-in hybrid electric vehicles (PHEVs), and fully electric vehicles (EVs). Each of these powertrains has unique lubrication requirements, ranging from traditional engine oils for ICEs to specialized lubricants for transmissions and electric drivetrains. Engine oil producers must adapt to this multifaceted landscape by diversifying their product portfolios and developing specialized lubricants to cater to all powertrain types. This diversification, while essential for market competitiveness, demands substantial research and development efforts.

Consumer Shift Towards Extended Oil Change Intervals

A challenge stemming from evolving consumer preferences is the trend towards extended oil change intervals. Modern synthetic and semi-synthetic engine oils, along with advancements in engine technology, have enabled drivers to extend the time between oil changes. While this is convenient for consumers, it presents a hurdle for engine oil manufacturers who must develop products capable of maintaining engine protection and performance over longer durations. Meeting these demands while ensuring that extended oil change intervals do not compromise engine longevity is a delicate balancing act that requires continuous innovation in engine oil formulations.

Growing Demand for Environmentally Responsible Products

The global trend towards environmental responsibility is compelling consumers to seek eco-friendly products, including engine oils. This shift presents a challenge as engine oil manufacturers are pressed to develop formulations with reduced environmental impact. Engine oils are scrutinized not only for their emissions-reducing properties but also for their sustainability throughout the production and disposal lifecycle. Sustainable sourcing of base oils, reducing packaging waste, and implementing eco-friendly production processes have all become priorities for manufacturers. Meeting these demands adds complexity and cost to the production process, but it is essential for maintaining a competitive edge in the market.

Rapid Technological Advancements in Automotive Engines

The continuous evolution of automotive engine technologies presents a constant challenge for engine oil manufacturers. Advanced engine designs, including downsized turbocharged engines, direct fuel injection, and variable valve timing, demand engine oils with enhanced performance characteristics. These oils must offer superior thermal stability, oxidation resistance, and protection against wear and deposits. Keeping pace with these rapid technological advancements requires ongoing research and development efforts to ensure that engine oils remain compatible with the latest engine designs and can deliver on the promise of improved performance, efficiency, and environmental responsibility. Staying ahead of these technological shifts is crucial for engine oil manufacturers.

Key Market Trends

Transition to Low-Viscosity Engine Oils for Enhanced Fuel Efficiency

One of the prominent trends in the Global Automotive Passenger Car Engine Oil market is the transition toward low-viscosity engine oils, driven by the quest for improved fuel efficiency and compliance with stringent emission standards. Low-viscosity oils, such as 0W-20 and 5W-30, possess properties that enable them to flow more easily at low temperatures while reducing friction within the engine. This leads to reduced energy losses and improved fuel economy, addressing the pressing need to reduce carbon emissions and enhance sustainability. Automakers and engine oil manufacturers are increasingly collaborating to develop and recommend low-viscosity engine oils for modern passenger cars. These oils offer benefits such as quicker engine start-ups in cold conditions, improved engine efficiency, and lower fuel consumption. Low-viscosity oils also contribute to reduced wear and tear on engine components, extending the lifespan of the engine. As emission standards continue to tighten globally, the demand for engine oils that help automakers meet these standards while simultaneously enhancing fuel efficiency is expected to be a significant driver for the Passenger Car Engine Oil market.

The Rise of Synthetic and Semi-Synthetic Engine Oils

The use of synthetic and semi-synthetic engine oils is on the ascent in the Passenger Car Engine Oil market. These advanced formulations offer superior performance and protection compared to conventional mineral-based oils. Synthetic engine oils are produced through a highly controlled manufacturing process, resulting in oils with

consistent quality and exceptional properties. Synthetic and semi-synthetic oils deliver a multitude of advantages, including: These oils are more stable at high temperatures, making them ideal for engines that operate under extreme conditions. Synthetic oils are less prone to oxidation, which helps maintain their lubrication properties over longer periods. Synthetic oils often enable longer drain intervals, reducing maintenance frequency and cost. They perform well in cold conditions due to their lower viscosity at low temperatures, promoting quicker engine starts. Synthetic oils provide enhanced protection against wear, ensuring the engine's longevity. As automakers increasingly recommend synthetic and semi-synthetic engine oils for their vehicles, consumers are more inclined to opt for these higher-performing lubricants. The market responds with a broader range of synthetic and semi-synthetic engine oil products to cater to the diverse needs of passenger car owners.

Formulation of Low-Sulfur and Environmentally Friendly Engine Oils

Environmental concerns are a significant driving force behind the formulation of low-sulfur and environmentally friendly engine oils in the Passenger Car Engine Oil market. Sulfur in engine oil can lead to the emission of sulfur dioxide (SO₂), a harmful pollutant. Regulatory authorities worldwide are imposing strict limits on sulfur content in engine oils to reduce air pollution and minimize the environmental impact of vehicle emissions. Manufacturers are responding by formulating engine oils with significantly lower sulfur content to ensure compliance with these regulations. Low-sulfur engine oils not only contribute to cleaner emissions but also prevent damage to advanced exhaust aftertreatment systems, such as catalytic converters and diesel particulate filters (DPFs). Moreover, there is a growing emphasis on the environmental impact of engine oil throughout its lifecycle. This includes sustainable sourcing of base oils and additives, as well as the recyclability and biodegradability of used engine oil. Engine oil manufacturers are investing in research and development to produce more environmentally friendly engine oils, aligning with global sustainability goals. Passenger car owners and environmentally conscious consumers are increasingly favoring engine oils that not only protect their vehicles but also reduce their environmental footprint. This trend underscores the importance of developing engine oils that are both low-sulfur and environmentally responsible.

Application-Specific Engine Oil Solutions

Another noteworthy trend in the Passenger Car Engine Oil market is the development of application-specific engine oil solutions. Today's passenger cars serve various purposes, from daily commuting to high-performance driving and off-road adventures.

To address the diverse needs of these vehicles, manufacturers are formulating specialized engine oils optimized for specific applications.

High-Performance Engine Oils: These oils are designed for sports cars and performance-oriented vehicles, offering superior protection under high-stress conditions, including racing and spirited driving.

Economy-Focused Engine Oils: Engine oils tailored for fuel efficiency are designed to reduce friction and improve mileage, making them ideal for eco-conscious consumers.

Long-Life Engine Oils: Some passenger car owners seek extended oil change intervals. Manufacturers develop engine oils with additives and formulations that support extended drain intervals without compromising engine protection.

Off-Road and SUV Engine Oils: Off-road and SUV-specific oils provide enhanced protection against dust, dirt, and high-temperature conditions, catering to the needs of adventurous drivers. Customized engine oil solutions cater to the specific challenges and requirements of different passenger car segments, ensuring optimal performance, protection, and longevity. Manufacturers collaborate closely with automakers to develop and recommend these specialized formulations, offering consumers a wider range of choices based on their vehicle and driving preferences.

Digitalization and Predictive Maintenance

The integration of digitalization and predictive maintenance solutions is transforming the Passenger Car Engine Oil market, enhancing engine oil management and vehicle maintenance practices. Digital technologies, including telematics, IoT sensors, and data analytics, are increasingly integrated into modern passenger cars to monitor engine performance and oil condition in real time. These digital solutions provide valuable insights into the health of the vehicle and the condition of the engine oil. Some key aspects include Oil Condition Monitoring: Sensors and telematics systems continuously monitor engine oil condition, tracking factors such as temperature, viscosity, and contaminants.

Segmental Insights

Grade Analysis

The mineral, synthetic, and semi-synthetic categories of automotive engine oil make up

most of the global market for engine oil. Compared to the synthetic and semi-synthetic oil categories, the mineral engine oil category commands the biggest market share for motor oils globally. As a byproduct of the oil refining process, mineral oil is produced directly from refined crude petroleum oil. Because they are less expensive and more readily available, mineral oils are mostly utilized in automobiles. Additionally, the most fundamental kind of oil and the kind most frequently utilized in most ordinary cars are mineral-based automobile engine oils. Where the weather is not particularly hot or cold, they are better suited for two-wheelers. Because semi-synthetic engine oils are less expensive than synthetic lubricants, the market for them is anticipated to rise over time. Mineral oil is a component in semi-synthetic oils, although only in small amounts.

Regional Insights

Due to the highest concentration of automobiles, particularly in countries like China, India, and Thailand, the Asia Pacific region is the largest and experiencing the quickest growth in the global motor oil industry. Additionally, India and China are predicted to have the biggest number of vehicles on the road, and India also has the largest market for two-wheelers, all of which will contribute to the expansion of the market for automotive engine oil. The market in North America is distinguished by significant government assistance for energy-efficient car engine oil. Additionally, it is anticipated that widespread awareness among the local populace would keep the market for synthetic engine oil active. The use of this environmentally friendly oil will regulate the market in Europe. Additionally, it is expected that China and India will have the most vehicles on the road. Since India is the world's largest two-wheeler market, the government is likely to be more motivated to encourage the use of energy-efficient engine oils. It is anticipated that widespread consumer knowledge about synthetic motor oil will keep demand for the product high in Europe. The market in Europe is predicted to be driven by the use of this environmentally friendly oil. The market share of automotive engine oil represented by South America, the Middle East, and Africa is expected to increase throughout the projected period because these markets are currently developing.

Key Market Players

Royal Dutch Shell plc

Pentagon Lubricants Private Limited

Castrol Limited

HINDUJA GROUP

Saudi Arabian Oil Co.

Total S.A

Gazprom

LUKOIL oil Company

Exxon Mobil Corporation

Chevron Corporation

Report Scope:

In this report, the Global Automotive Passenger Cars Engine Oil Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Passenger Cars Engine Oil Market, By Grade:

Synthetic

Semi synthetic

Minerals

Automotive Passenger Cars Engine Oil Market, By Demand Category:

OEM

Aftermarket

Automotive Passenger Cars Engine Oil Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

France

Russia

United Kingdom

Italy

Germany

Spain

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Passenger Cars Engine Oil Market.

Available Customizations:

Global Automotive Passenger Cars Engine Oil market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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 - 14.1.1.3. Financials (As Per Availability)
 - 14.1.1.4. Recent Developments
 - 14.1.1.5. Key Management Personnel
 - 14.1.2. Pentagon Lubricants Private Limited
 - 14.1.2.1. Company Details
 - 14.1.2.2. Key Product Offered
 - 14.1.2.3. Financials (As Per Availability)
 - 14.1.2.4. Recent Developments
 - 14.1.2.5. Key Management Personnel
 - 14.1.3. HINDUJA GROUP
 - 14.1.3.1. Company Details
 - 14.1.3.2. Key Product Offered

- 14.1.3.3. Financials (As Per Availability)
- 14.1.3.4. Recent Developments
- 14.1.3.5. Key Management Personnel
- 14.1.4. Saudi Arabian Oil Co.
 - 14.1.4.1. Company Details
 - 14.1.4.2. Key Product Offered
 - 14.1.4.3. Financials (As Per Availability)
 - 14.1.4.4. Recent Developments
 - 14.1.4.5. Key Management Personnel
- 14.1.5. Total S.A
 - 14.1.5.1. Company Details
 - 14.1.5.2. Key Product Offered
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Recent Developments
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- 14.1.6. Gazprom
 - 14.1.6.1. Company Details
 - 14.1.6.2. Key Product Offered
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 - 14.1.6.4. Recent Developments
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- 14.1.7. LUKOIL oil Company
 - 14.1.7.1. Company Details
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 - 14.1.8.3. Financials (As Per Availability)
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- 14.1.9. Chevron Corporation
 - 14.1.9.1. Company Details
 - 14.1.9.2. Key Product Offered
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Recent Developments
 - 14.1.9.5. Key Management Personnel

14.1.10. Castrol Ltd.

14.1.10.1. Company Details

14.1.10.2. Key Product Offered

14.1.10.3. Financials (As Per Availability)

14.1.10.4. Recent Developments

14.1.10.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas

15.1.1. Target Regions

15.1.2. Target Grade

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