

Asia Pacific Automotive Synthetic Ester Lubricants Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Automotive Synthetic Ester Lubricants Market is projected to grow significantly, reaching an estimated US\$ 626.6 million by 2031, up from US\$ 436.8 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 5.5% from 2025 to 2031.

Executive Summary and Market Analysis

The Asia Pacific region is a leader in the global automotive synthetic ester lubricants market, primarily due to high vehicle production rates and rapid industrialization in major economies. China stands out as the largest automotive market worldwide, with the China Association of Automobile Manufacturers (CAAM) reporting a production of 15.621 million vehicles in the first half of 2025, marking a 12.5% increase year-over-year. The production of New Energy Vehicles (NEVs) continues to expand rapidly, further driving demand for advanced lubricants.

India's automotive landscape is also noteworthy, with over 300 million registered vehicles as of 2023, according to the Federation of Automobile Dealers Associations (FADA). The trend of consumers retaining vehicles for over a decade creates a sustained demand for aftermarket lubricants. In Japan, the average vehicle age reached 13.8 years in 2023, leading to a need for frequent part replacements and high-quality synthetic lubricants.

Government initiatives across the region are promoting fleet modernization. For instance, India's FAME-II scheme supports the adoption of electric vehicles, while China has implemented stringent emission standards, such as the China VI norms, which compel operators to invest in fuel-efficient and low-emission vehicles that require

advanced synthetic ester lubricants. The automotive aftermarket in Asia Pacific is substantial, with China alone exceeding 300 million units, as reported by CAAM. Additionally, countries like Thailand and Indonesia are emerging as electric vehicle manufacturing hubs, supported by government policies that encourage EV sales growth.

Strategic Insights

Market Segmentation

The Asia Pacific Automotive Synthetic Ester Lubricants Market is categorized by product type and end use. By product type, the market includes segments such as Engine Oil, MCO, PCMO, HDEO, Hydraulic Oil, Gear Oil, Immersion Cooling Fluids, Refrigeration Oil, Grease, Metalworking Fluids, and others. The Engine Oil segment was the market leader in 2024. In terms of end use, the market is divided into Conventional Vehicles and Electric Vehicles, with Conventional Vehicles dominating in 2024.

Market Outlook

The increasing demand for extended oil drain intervals is a significant driver for the adoption of synthetic ester lubricants in automotive applications. Advances in engine and oil technology have enabled manufacturers to extend oil change intervals significantly, with some vehicles now capable of going 60,000 to 80,000 miles between changes.

For example, a typical Class 8 truck that follows conventional oil change intervals may require 4-8 oil changes per year, costing between \$350 and \$500 per service. However, with a properly implemented extended drain interval program using synthetic oil, oil changes can be reduced to just 2 per year, occurring every 50,000-60,000 miles. Synthetic esters are known for their resistance to oxidation and chemical degradation, their ability to perform well in extreme temperatures, and their capacity to reduce sludge and surface deposits, all of which contribute to longer oil change intervals.

In a comparative study, a compressor using PAO synthetic lubricant consumed only 13.2 gallons over 10,000 operating hours, compared to 26.4 gallons for mineral oil. This results in a total lubricant consumption of 66 gallons for synthetic versus 554.8 gallons for mineral oil. The cost-effectiveness of synthetic lubricants is evident, as they can lead to significant savings when considering the reduced number of filter changes and labor

costs associated with fewer oil changes.

Country Insights

The Asia Pacific Automotive Synthetic Ester Lubricants Market is further segmented by country, including Australia, China, India, Japan, South Korea, and the Rest of APAC. China is expected to maintain the largest market share in 2024.

China's market for automotive synthetic ester lubricants is anticipated to grow due to its vast production capabilities and the rapid electrification of vehicles. The demand for synthetic ester lubricants is increasing as they perform reliably in extreme temperatures, enhance fuel economy, and comply with stringent environmental regulations set by the Chinese government. The rise in hybrid and electric vehicle adoption is also driving the need for advanced lubricants suitable for modern technologies and thermal systems. Local lubricant manufacturers are expanding their ester production capacities and improving formulation quality to meet both domestic and international performance standards. Collaborations with global lubricant companies are also on the rise, enhancing technological capabilities and product offerings.

Company Profiles

Key players in the Asia Pacific Automotive Synthetic Ester Lubricants Market include Exxon Mobil Corp, TotalEnergies SE, Chevron Corp, BP Plc, China Petroleum & Chemical Corp (Sinopec), Fuchs SE, Valvoline Inc, Repsol SA, Phillips 66, and AMSOIL Inc. These companies are pursuing various strategies, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products to consumers.

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