

Europe Lubricants Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Base Oil (Mineral Oil, Synthetic Oil, and Bio-based Oil), Type (Hydraulic Fluid, Engine Oil, Driveline Lubricants, Metalworking Fluids, Grease, Process Oils, Coolants, and Others), and End-use Industry (Automotive, Passenger Cars, Light Commercial Vehicle, Heavy Commercial Vehicle, Others¹, Building and Construction, Power Generation, Mining and Metallurgy, Food Processing, Oil and Gas, Marine, Aviation, and Others)

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Abstracts

The Europe Lubricants Market is projected to grow significantly, reaching an estimated US\$ 53,996.8 million by 2031, up from US\$ 41,409.7 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.1% from 2025 to 2031.

Executive Summary and Market Analysis

The increasing installation of both onshore and offshore wind energy plants, alongside a rising demand for renewable energy, is driving the utilization of lubricants in Europe. According to WindEurope, Europe added 6.4 gigawatts (GW) of new wind power capacity in the first half of 2024, with onshore wind accounting for 83% of this new capacity. The European Union (EU) is expected to average 22 GW of new wind farm installations annually from 2024 to 2030. Given that wind turbine gearboxes are subjected to harsh environmental conditions, including extreme temperatures and

potential corrosion from saltwater, effective lubrication is essential to enhance the viscosity and durability of these components against cold weather impacts.

The automotive sector is another significant contributor to the European economy, particularly in countries like Germany, the UK, and Italy, which host major automotive manufacturers such as Volkswagen AG, Stellantis NV, and Mercedes-Benz Group AG. In this industry, lubricants play a crucial role in improving engine performance and protecting components from corrosion, oxidation, and high-pressure conditions. The European Commission highlights that the building and construction sector provides around 18 million direct jobs and contributes approximately 9% to the EU's GDP. The ongoing expansion in construction activities across Europe is further fueling the demand for lubricants, supported by increased government spending on infrastructure projects.

Strategic Insights

Market Segmentation Analysis

The Europe Lubricants Market can be segmented by base oil, type, and end-use industry:

By Base Oil: The market is divided into Mineral Oil, Synthetic Oil, and Bio-based Oil, with Mineral Oil holding the largest market share in 2024.

By Type: The market includes Hydraulic Fluid, Engine Oil, Driveline Lubricants, Metalworking Fluids, Grease, Process Oils, Coolants, and others, where Engine Oil is the leading segment.

By End-use Industry: The market is categorized into Automotive, Building and Construction, Power Generation, Mining and Metallurgy, Food Processing, Oil and Gas, Marine, Aviation, and others, with the Automotive sector dominating in 2024.

Market Outlook

The renewable energy sector is a major consumer of industrial lubricants, particularly turbine and transformer oils. Wind energy is rapidly growing, with Europe expected to install 260 GW of new wind power capacity from 2024 to 2030. As countries increasingly adopt renewable energy sources, especially wind power, the demand for

specialized lubricants to ensure the efficient operation of wind turbines is becoming critical. These lubricants are essential for enhancing operational efficiency and extending the lifespan of the complex machinery involved in wind energy production. The growth of the wind energy sector necessitates a reliable supply of high-performance lubricants to minimize wear, reduce friction, and prevent corrosion in wind turbine components. This demand encourages innovation in lubricant formulations tailored to the unique challenges of the wind energy environment.

According to the International Energy Agency (IEA), global annual renewable capacity additions surged by nearly 50% to almost 510 GW in 2023, marking the fastest growth rate in two decades. As the renewable energy industry expands, lubricant manufacturers have opportunities to form partnerships and distribution networks, contributing to global economic development. This synergy between the wind energy sector and the lubricants market fosters job creation, investment, and technological advancements.

Country Insights

The Europe Lubricants Market is also analyzed by country, including Germany, France, the United Kingdom, Italy, Russia, Spain, Poland, Czech Republic, Turkey, and the Rest of Europe. The Rest of Europe, which encompasses countries like the Netherlands, Belgium, Denmark, Austria, Switzerland, Sweden, Norway, and Hungary, held the largest market share in 2024. These countries rely heavily on advanced machinery and equipment across various industries, leading to a heightened demand for effective lubrication solutions to ensure smooth operations and extend equipment life. Urbanization and infrastructure development in these regions are driving increased construction and transportation activities, further boosting the demand for lubricants to maintain the efficiency and reliability of construction equipment and vehicles.

Company Profiles

Key players in the Lubricants Market include Exxon Mobil Corp, TotalEnergies SE, Shell Plc, Chevron Corp, BP Plc, Lukoil, Fuchs SE, Valvoline Inc, Petro-Canada Lubricants Inc., Repsol SA, ENEOS Holdings Inc, Gulf Oil International Ltd, and others. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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