

Lubricants Market Size and Forecast (2021 - 2031), Global and 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), End-Use Industry [Automotive (Passenger Cars, Light Commercial Vehicles, Heavy Commercial Vehicles, and Others), Building and Construction, Power Generation, Mining and Metallurgy, Food Processing, Oil and Gas, Marine, Aviation, and Others], and Geography

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Abstracts

The lubricants market size was valued at US\$ 175.73 billion in 2024 and is expected to reach US\$ 236.71 billion by 2031; it is estimated to register a CAGR of 4.6% from 2025 to 2031.

Manufacturers globally are investing in improving their supply chain to increase automobile sales in developing regions. According to the Society of Indian Automobile Manufacturers (SIAM), in India, sales of passenger vehicles increased to 2,854,242 units in November 2023 from 2,409,535 units in November 2022. Similarly, according to the China Association of Automobile Manufacturers (CAAM), the sales of commercial vehicles accounted for 18.3% year-on-year for September 2023 in China. According to the National Economic Development and Labor Council (Nedlac), automobile

production in South Africa reached 633,332 units in 2023 and generated a revenue of US\$ 14.7 in the same year. The South African automotive manufacturing industry is the 22nd largest in the world in terms of number of vehicles produced and is the largest on the African continent, accounting for more than 54% of vehicles assembled on the continent in 2023. According to the International Organization of Motor Vehicle Manufacturers (OICA), Brazil was the largest manufacturer and exporter of light and commercial vehicles in 2023 in South & Central America. The country reported production of 2.3 million vehicles in 2022. Traditionally, lubricants have been essential in internal combustion engine (ICE) vehicles, where they reduce friction, prevent wear, and help manage engine heat.

Electric vehicles, despite not having traditional engines, still rely on lubricants in several components such as transmissions, motors, and other drivetrain parts. These vehicles often require specialized lubricants to ensure efficient power transfer, cooling, and long-term durability of electric motor components. As EVs typically use different mechanical structures than ICE vehicles, the demand for high-performance lubricants has expanded to meet the unique needs of these systems. According to the International Energy Agency's annual Global Electric Vehicle Outlook, over 14 million electric cars were sold worldwide in 2023. Thus, the overall growth of the automobile industry accelerates the demand for lubricants, which contribute to better vehicle performance and longevity.

In the lubricants market, Asia Pacific is expected to register highest CAGR during 2024-2031. China, Australia, and Vietnam accounted for major antimony mine production and reserves. Further, India, China, and Australia were the leading countries in global mine production and reserves for garnets. Mining, quarrying, and perforating operations utilize lubricants to increase the lifespan and performance of the machinery. Therefore, the high number of metal and nonmetal reserves and a rise in regional mining operations are expected to boost the demand for lubricants. Further, Asia Pacific has been the world's largest and fastest-growing producer of renewable energy for more than 10 years. The government of Japan has set the target of 10 GW of offshore wind energy installation by 2030 and 30–45 GW by 2040. Thus, the growth of the wind energy market in the region propels the demand for lubricants.

A few players operating in the global lubricants market include Castrol Ltd, Shell Plc, Pennzoil, Quaker State Lubrication Limited, TotalEnergies SE, Repsol Group, Mobil, Motul SA, Valvoline Inc, and Chevron Corp. Players operating in the global lubricants market focus on providing high-quality products to fulfill customer demand. Also, they are focusing on launching new and high-quality products for their customers.

Manufacturers play a pivotal role in shaping the lubricants market, influencing its dynamics through production, innovation, and market strategies. As key contributors to the region's industrial landscape, lubricant manufacturers are often at the forefront of meeting the diverse needs of various sectors, including automotive, manufacturing, and agriculture. These manufacturers are responsible for formulating and producing lubricants that adhere to industry standards and address specific performance requirements. The quality and effectiveness of their products directly impact the efficiency and longevity of machinery and equipment across different applications. Manufacturers must navigate challenges related to raw material sourcing, production processes, and quality control to ensure the reliability of their lubricants in the market. Market strategies, including pricing, distribution, and branding, are also within the scope of lubricant manufacturers. Establishing strong distribution networks and brand recognition is critical for market penetration and customer trust. Manufacturers often engage in strategic partnerships with suppliers, distributors, and even research institutions to enhance their capabilities and maintain a robust presence in the competitive landscape.

The overall global lubricants market size has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the market. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights into the topic. The participants of this process include industry experts such as VPs, business development managers, market intelligence managers, and national sales managers—along with external consultants such as valuation experts, research analysts, and key opinion leaders—specializing in the lubricants market.

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