

North America 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 North America Lubricants Market is projected to grow significantly, reaching an estimated US\$ 44,718.9 million by 2031, up from US\$ 35,990.7 million in 2024, reflecting a compound annual growth rate (CAGR) of 3.4% from 2025 to 2031. This growth is driven by increasing demand across various end-use industries, including automotive, building and construction, wind energy, aerospace, and mining.

The construction sector in North America is experiencing robust growth, fueled by government investments in residential projects and renovations. Industrial lubricants play a crucial role in this industry, as they are engineered to withstand extreme conditions, combat dirt and debris, and enhance equipment performance. The automotive sector, which is the most prevalent mode of transportation in the region, is

also expanding. With rising per capita income, the demand for vehicles is increasing. According to the Organisation Internationale des Constructeurs d'Automobiles (OICA), vehicle production in North America rose by 10%, from approximately 13.5 million in 2021 to 14.8 million in 2022. This surge in automotive production correlates with a heightened need for lubricants that ensure the smooth operation and longevity of vehicle components, such as engines and wheel bearings. As the automotive industry innovates, the demand for high-performance lubricants is on the rise.

Additionally, the renewable energy sector, particularly wind energy, is contributing to lubricant demand. The US Energy Information Administration reports that the installed wind power capacity in the US has grown from 2.4 gigawatts (GW) in 2000 to 150.1 GW by April 2024. Lubricants are essential in protecting critical components of wind turbines from harsh weather and contaminants. Similarly, in the aerospace industry, lubricants are vital for the maintenance of aircraft components, ensuring protection against corrosion and extreme conditions. The US is home to major aerospace manufacturers like Boeing and Lockheed Martin, which further drives lubricant demand in this sector.

The North America Lubricants Market is segmented by base oil, type, and end-use industry. By base oil, the market includes mineral oil, synthetic oil, and bio-based oil, with mineral oil holding the largest market share in 2024. In terms of type, engine oil is the leading segment, while the automotive sector dominates the end-use industry segment.

A notable trend in the lubricants market is the shift towards bio-based lubricants, which are derived from renewable plant sources such as vegetable oils. This transition is driven by the environmental benefits of bio-based lubricants, which are biodegradable, non-toxic, and produce fewer greenhouse gas emissions. Industries such as automotive, manufacturing, agriculture, and marine are increasingly adopting these eco-friendly alternatives. In the automotive sector, bio-based lubricants are recognized for their ability to reduce engine wear and enhance fuel efficiency while adhering to environmental standards. The agricultural sector is also showing a growing preference for bio-lubricants, particularly for machinery used in sensitive environments where petroleum-based lubricants could cause soil contamination.

The marine industry is witnessing a rise in the use of bio-based lubricants, especially for vessels operating in ecologically sensitive areas, as these lubricants help mitigate pollution risks. Furthermore, bio-based lubricants offer improved thermal stability and oxidative resistance, which enhances the longevity and performance of machinery.

Governments and regulatory bodies are promoting the adoption of bio-based products through incentives, fostering sustainability in the industrial sector. As technology advances, the performance of bio-based lubricants is expected to improve, leading to increased adoption and contributing to a more sustainable industrial future.

The North America Lubricants Market is further segmented by country, with the United States holding the largest market share in 2024, followed by Canada and Mexico. The U.S. market is also experiencing growth in related sectors, such as home renovation and construction, which indirectly supports the lubricants market.

Key players in the Lubricants Market include Exxon Mobil Corp, TotalEnergies SE, Shell Plc, Chevron Corp, BP Plc, and others. These companies are employing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and meet the evolving needs of consumers. The competitive landscape is characterized by a focus on delivering innovative products that align with market trends and consumer preferences.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. LUBRICANTS MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Porter's Five Forces Analysis
 - 4.2.1 Threat of New Entrants:
 - 4.2.2 Threat of Substitutes:
 - 4.2.3 Bargaining Power of Buyers:
 - 4.2.4 Bargaining Power of Suppliers:
 - 4.2.5 Competitive Rivalry:
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
 - 4.3.5 List of Vendors in the Value Chain

5. NORTH AMERICA LUBRICANTS MARKET - KEY MARKET DYNAMICS

North America Lubricants Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity...

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. LUBRICANTS MARKET - NORTH AMERICA MARKET ANALYSIS

- 6.1 North America Lubricants Market Volume (Kilo Tons), 2021 - 2031
- 6.2 North America Lubricants Market Volume Forecast and Analysis (Kilo Tons)
- 6.3 North America Lubricants Market Revenue (US\$ Million), 2024 -2031
- 6.4 North America Lubricants Market Forecast and Analysis

7. NORTH AMERICA LUBRICANTS MARKET REVENUE ANALYSIS - BY BASE OIL

- 7.1 Mineral Oil
 - 7.1.1 Overview
 - 7.1.2 Mineral Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.2 Synthetic Oil
 - 7.2.1 Overview
 - 7.2.2 Synthetic Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 7.3 Bio-based Oil
 - 7.3.1 Overview
 - 7.3.2 Bio-based Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. NORTH AMERICA LUBRICANTS MARKET REVENUE ANALYSIS - BY TYPE

- 8.1 Hydraulic Fluid
 - 8.1.1 Overview
 - 8.1.2 Hydraulic Fluid: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- 8.2 Engine Oil
 - 8.2.1 Overview
 - 8.2.2 Engine Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Driveline Lubricants

8.3.1 Overview

8.3.2 Driveline Lubricants: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.4 Metalworking Fluids

8.4.1 Overview

8.4.2 Metalworking Fluids: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.5 Grease

8.5.1 Overview

8.5.2 Grease: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.6 Process Oils

8.6.1 Overview

8.6.2 Process Oils: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.7 Coolants

8.7.1 Overview

8.7.2 Coolants: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.8 Others

8.8.1 Overview

8.8.2 Others: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. NORTH AMERICA LUBRICANTS MARKET REVENUE ANALYSIS - BY END-USE INDUSTRY

9.1 Automotive

9.1.1 Overview

9.1.2 Automotive: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Passenger Cars

9.2.1 Overview

9.2.2 Passenger Cars: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Light Commercial Vehicle

9.3.1 Overview

9.3.2 Light Commercial Vehicle: North America Lubricants Market - Revenue and

Forecast, 2021 - 2031 (US\$ Million)

9.4 Heavy Commercial Vehicle

9.4.1 Overview

9.4.2 Heavy Commercial Vehicle: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.5 Others1

9.5.1 Overview

9.5.2 Others1: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.6 Building and Construction

9.6.1 Overview

9.6.2 Building and Construction: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.7 Power Generation

9.7.1 Overview

9.7.2 Power Generation: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.8 Mining and Metallurgy

9.8.1 Overview

9.8.2 Mining and Metallurgy: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.9 Food Processing

9.9.1 Overview

9.9.2 Food Processing: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.10 Oil and Gas

9.10.1 Overview

9.10.2 Oil and Gas: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.11 Marine

9.11.1 Overview

9.11.2 Marine: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.12 Aviation

9.12.1 Overview

9.12.2 Aviation: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.13 Others

9.13.1 Overview

9.13.2 Others: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. NORTH AMERICA LUBRICANTS MARKET - COUNTRY ANALYSIS

10.1 North America

10.1.1 North America Lubricants Market Revenue and Forecast and Analysis - by Country

10.1.1.1 North America Lubricants Market Volume and Forecast and Analysis - by Country

10.1.1.2 North America Lubricants Market Revenue and Forecast and Analysis - by Country

10.1.2.2 United States: North America Lubricants Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

10.1.2.2.1 United States: North America Lubricants Market Share - by Base Oil

10.1.2.2.2 United States: North America Lubricants Market Share - by Type

10.1.2.2.3 United States: North America Lubricants Market Share - by End-use Industry

10.2.3.3 Canada: North America Lubricants Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

10.2.3.3.1 Canada: North America Lubricants Market Share - by Base Oil

10.2.3.3.2 Canada: North America Lubricants Market Share - by Type

10.2.3.3.3 Canada: North America Lubricants Market Share - by End-use Industry

10.3.4.4 Mexico: North America Lubricants Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

10.3.4.4.1 Mexico: North America Lubricants Market Share - by Base Oil

10.3.4.4.2 Mexico: North America Lubricants Market Share - by Type

10.3.4.4.3 Mexico: North America Lubricants Market Share - by End-use Industry

11 COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

12 INDUSTRY LANDSCAPE

12.1 Overview

12.2 New Product Development

12.3 Merger and Acquisition

12.4 Other Strategic Developments

13 COMPANY PROFILES

13.1 Exxon Mobil Corp

- 13.1.1 Key Facts
- 13.1.2 Business Description
- 13.1.3 Products and Services
- 13.1.4 Financial Overview
- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments

13.2 TotalEnergies SE

- 13.2.1 Key Facts
- 13.2.2 Business Description
- 13.2.3 Products and Services
- 13.2.4 Financial Overview
- 13.2.5 SWOT Analysis
- 13.2.6 Key Developments

13.3 Shell Plc

- 13.3.1 Key Facts
- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments

13.4 Chevron Corp

- 13.4.1 Key Facts
- 13.4.2 Business Description
- 13.4.3 Products and Services
- 13.4.4 Financial Overview
- 13.4.5 SWOT Analysis
- 13.4.6 Key Developments

13.5 BP Plc

- 13.5.1 Key Facts
- 13.5.2 Business Description
- 13.5.3 Products and Services
- 13.5.4 Financial Overview
- 13.5.5 SWOT Analysis
- 13.5.6 Key Developments

- 13.6 Lukoil
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 Fuchs SE
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 Valvoline Inc
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 Petro-Canada Lubricants Inc.
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 Repsol SA
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments
- 13.11 ENEOS Holdings Inc
 - 13.11.1 Key Facts
 - 13.11.2 Business Description
 - 13.11.3 Products and Services

- 13.11.4 Financial Overview
- 13.11.5 SWOT Analysis
- 13.11.6 Key Developments
- 13.12 Gulf Oil International Ltd
 - 13.12.1 Key Facts
 - 13.12.2 Business Description
 - 13.12.3 Products and Services
 - 13.12.4 Financial Overview
 - 13.12.5 SWOT Analysis
 - 13.12.6 Key Developments
- 13.13 Compania Espanola de Petroleos SA
 - 13.13.1 Key Facts
 - 13.13.2 Business Description
 - 13.13.3 Products and Services
 - 13.13.4 Financial Overview
 - 13.13.5 SWOT Analysis
 - 13.13.6 Key Developments
- 13.14 Puma Energy Holdings Pte Ltd
 - 13.14.1 Key Facts
 - 13.14.2 Business Description
 - 13.14.3 Products and Services
 - 13.14.4 Financial Overview
 - 13.14.5 SWOT Analysis
 - 13.14.6 Key Developments
- 13.15 China National Petroleum Corporation (CNPC)
 - 13.15.1 Key Facts
 - 13.15.2 Business Description
 - 13.15.3 Products and Services
 - 13.15.4 Financial Overview
 - 13.15.5 SWOT Analysis
 - 13.15.6 Key Developments
- 13.16 PETROFER Chemie H. R. Fischer GmbH + Co. KG
 - 13.16.1 Key Facts
 - 13.16.2 Business Description
 - 13.16.3 Products and Services
 - 13.16.4 Financial Overview
 - 13.16.5 SWOT Analysis
 - 13.16.6 Key Developments
- 13.17 GP Global Group

- 13.17.1 Key Facts
- 13.17.2 Business Description
- 13.17.3 Products and Services
- 13.17.4 Financial Overview
- 13.17.5 SWOT Analysis
- 13.17.6 Key Developments

14. APPENDIX

- 14.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. North America Lubricants Market Segmentation

Table 2. List of Vendors

Table 3. North America Lubricants Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

Table 4. North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 5. North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Base Oil

Table 6. North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 7. North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 8. North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 9. United States: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Base Oil

Table 10. United States: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 11. United States: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 12. Canada: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Base Oil

Table 13. Canada: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 14. Canada: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 15. Mexico: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Base Oil

Table 16. Mexico: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Type

Table 17. Mexico: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by End-use Industry

Table 18. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

- Figure 1. North America Lubricants Market Segmentation - Country
- Figure 2. Porter's Analysis
- Figure 3. Ecosystem: Lubricants Market
- Figure 4. North America Lubricants Market - Key Market Dynamics
- Figure 5. Impact Analysis of Drivers and Restraints
- Figure 6. North America Lubricants Market Volume (Kilo Tons), 2021 - 2031
- Figure 7. North America Lubricants Market Revenue (US\$ Million), 2024 - 2031
- Figure 8. North America Lubricants Market Share (%) - by Base Oil, 2024 and 2031
- Figure 9. Mineral Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 10. Synthetic Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 11. Bio-based Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 12. North America Lubricants Market Share (%) - by Type, 2024 and 2031
- Figure 13. Hydraulic Fluid: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 14. Engine Oil: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 15. Driveline Lubricants: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 16. Metalworking Fluids: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 17. Grease: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 18. Process Oils: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 19. Coolants: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 20. Others: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 21. North America Lubricants Market Share (%) - by End-use Industry, 2024 and 2031
- Figure 22. Automotive: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

- Figure 23. Passenger Cars: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 24. Light Commercial Vehicle: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 25. Heavy Commercial Vehicle: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 26. Others1: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 27. Building and Construction: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 28. Power Generation: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 29. Mining and Metallurgy: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 30. Food Processing: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 31. Oil and Gas: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 32. Marine: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 33. Aviation: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 34. Others: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 35. North America Lubricants Market Breakdown by Key Countries, 2024 and 2031 (%)
- Figure 36. United States: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 37. Canada: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 38. Mexico: North America Lubricants Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)
- Figure 39. Company Positioning & Concentration

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