

South & Central 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)

<https://marketpublishers.com/r/SF9E07808201EN.html>

Date: November 2025

Pages: 250

Price: US\$ 3,450.00 (Single User License)

ID: SF9E07808201EN

Abstracts

The South & Central America Lubricants Market is projected to grow significantly, reaching an estimated US\$ 11,528.0 million by 2031, up from US\$ 9,420.9 million in 2024, reflecting a compound annual growth rate (CAGR) of 3.1% from 2025 to 2031. This growth is largely driven by the expanding automotive industry in the region, which presents substantial opportunities for lubricant usage.

As car ownership rises due to increased disposable income and improved living standards, the demand for automotive maintenance lubricants is also on the rise. Major automotive companies are strategically enhancing their operational capacities in South & Central America to capitalize on this burgeoning market. For instance, Audi AG made a notable investment of US\$ 19.2 million in 2022 to resume production at its facility in

Parana, Brazil, with a capacity of 4,000 vehicles annually. The surge in passenger car sales is a primary factor propelling the demand for lubricants in the region.

The diverse climates and geographical conditions across South & Central America present unique challenges for machinery maintenance, making lubricants essential for protecting against corrosion, rust, and extreme temperatures. In the agricultural sector, machinery often operates under varied environmental conditions, necessitating reliable lubricants to ensure optimal performance. Furthermore, government initiatives across various countries in the region are focused on infrastructure development to keep pace with urbanization, which in turn boosts the demand for construction machinery and equipment, further driving lubricant market growth.

Market Segmentation

The South & Central America 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 in 2024.

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.

Shift Towards Bio-based Lubricants

A significant trend in the lubricants market is the shift from conventional petroleum-based lubricants to bio-based alternatives. Bio-based lubricants, derived from renewable plant sources such as vegetable oils, are gaining popularity due to their lower environmental impact. They are biodegradable, non-toxic, and produce fewer greenhouse gases during their lifecycle. This transition is driven by the demand for environmentally friendly products that offer longer service life and high performance.

Industries such as automotive, manufacturing, agriculture, and marine are increasingly adopting bio-based lubricants. In the automotive sector, these lubricants are recognized for their ability to reduce engine wear and enhance fuel efficiency while adhering to eco-friendly standards. Similarly, in agriculture, bio-based lubricants are preferred for machinery operating in sensitive environments to prevent soil contamination. The marine industry is also seeing a rise in bio-based lubricant usage, particularly for vessels in ecologically sensitive areas, as they help mitigate pollution risks.

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

Country Insights

The South & Central America Lubricants Market is further segmented by country, with Brazil, Argentina, and the Rest of South & Central America being the key regions. Brazil is the largest market, driven by its robust automotive, residential, and commercial construction sectors. As one of the leading automotive producers in the region, Brazil reported the production of 2.3 million vehicles in 2022, marking a 5% increase from the previous year. This growth in automotive production and vehicle ownership is expected to further boost lubricant demand.

Additionally, Brazil is the largest oil producer in South & Central America and ranks eighth globally. The country possesses significant ultra-deep oil reserves, with the majority of its oil production occurring offshore. The national oil company, Petrobras, plays a crucial role in this sector, accounting for a substantial portion of Brazil's oil and gas production. Consequently, the growth in oil and gas production in Brazil is a key driver of lubricant demand in the country.

Competitive Landscape

Key players in the Lubricants Market include Exxon Mobil Corp, TotalEnergies SE, Shell Plc, Chevron Corp, BP Plc, Lukoil, Fuchs SE, Valvoline Inc, and others. These companies are actively pursuing 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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