



**China Automotive Chemicals Industry  
Report, 2011-2012**

**Aug. 2012**

## STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## INFORMATION SOURCES

The primary information sources include China Customs, National Bureau of Statistics of China and WIND Database etc.

## Abstract

Thanks to the boom of automotive manufacturing industry, China has become one of the world's important automotive chemicals producers and consumers. Automotive chemicals mainly consist of five varieties, namely, chemicals for lubrication, chemicals for cleaning, chemicals for protection, automotive coating and adhesives. Of these, automotive lubricant takes the lion's share in the automotive chemicals consumption market, with the apparent consumption in 2011 hitting 4.76 million tons approximately.

The automotive OEM/OES market is the competitive emphasis of automotive lubricant market, heavily depending on the auto manufacturers' acceptance to lubricant brands. China currently has around 4,000 lubricant manufacturers, most of which feature small scale and have no access to the automotive lubricant market with demanding quality requirements. In China's OEM/OES market, although European and American auto manufacturers prefer European and American lubricant brands including Castrol, Shell, Fuchs and Mobil, products made by state-run enterprises, like Great Wall Lubricant of Sinopec, have won acclaims from many domestic and foreign auto brands. Nevertheless, lubricants for Japanese auto brands are mainly supplied by Japanese lubricant producers such as ENEOS and Idemitsu.

### Lubricant Brands Used by Some Auto Manufacturers in China

Auto Brands	Lubricant Brands	Auto Brands	Lubricant Brands
Chery	Great Wall, Mobil	Dongfeng Nissan	Shell, Idemitsu
Audi	Castrol	Guangzhou Honda	ENEOS
SGM	Fuchs, Shell, Great Wall	Guangzhou Toyota	Idemitsu, Great Wall
FAW-VW	Great Wall, Castrol	FAW Toyota	ENEOS

Source: ResearchInChina <China Automotive Chemicals Industry Report, 2011-2012>

In China, Sinopec (Great Wall Lubricant) and CNPC (Kunlun Lubricant) are major suppliers of automotive lubricant, accounting for 60% of the market. However, transnational enterprises firmly seize the lion's share and gain high profits in the medium and high-end automotive lubricant market by virtue of advanced technology and good brand reputation. In addition, private businesses and joint ventures including JiangSu Lopal Petrochemical, COPTON, Guangdong Delian Group win some market share by merit of high-quality service and professional technical support.

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**The report highlights the following aspects:**

- Status quo, competition pattern and international market environment of China's automotive chemicals industry;
- Influence of upstream industries including base oil, ethylene glycol and additives as well as downstream auto industry on China's automotive chemicals market;
- Status quo and supply & demand of market segments such as automotive lubricant, cleaning & maintenance supplies, automotive coating and adhesives;
- Operation of 13 automotive chemicals suppliers including Shell, BP, CNPC (Kunlun), Sinopec (Great Wall) and Guangdong Delian Group, and their automotive chemicals business development in China.

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