



China Lubricant Industry Report, 2013-2016

Jul. 2014

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

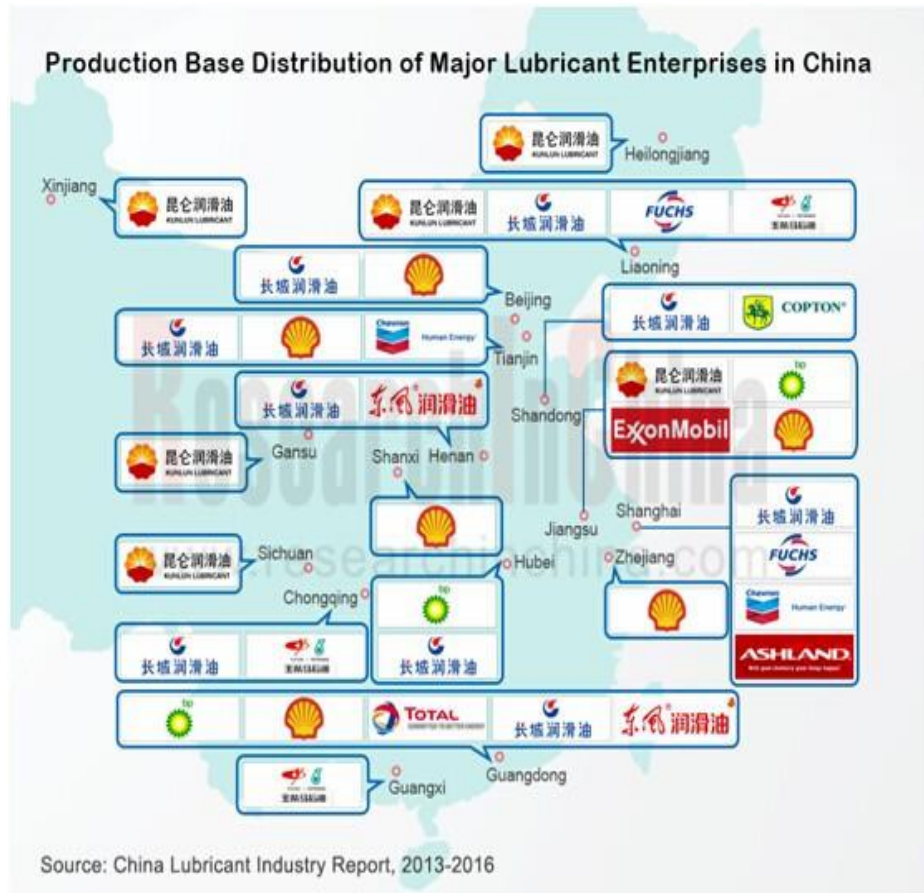
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Amid the slow growth of the global economy, although China's automobile output and ownership maintain rapid growth, the development of construction machinery manufacturing industry, transportation industry, construction industry and other industries slows down, which greatly depresses the boom of Chinese lubricant market. In 2013, China's lubricant output and sales volume fell sharply, wherein the output plunged by 30.2% year on year to 5,896,900 tons.

Affected by the distribution of resources, China lubricant industry is featured with apparent regional characteristics. Production areas mainly concentrate in East China, Northeast China and North China. In 2013, Liaoning, Shandong, Shanghai and Guangdong ranked the top four Chinese provinces by lubricant output. Particularly, Liaoning produced 1,391,100 tons, accounting for 23.8% of the national output.

By the end of 2013, there had been over 4,000 Chinese lubricant production enterprises. State-owned brands represented by Great Wall (Sinopec) and Kunlun (CNPC) as well as foreign brands including Shell, Mobil, BP, FUCHS and Total occupied most share of Chinese lubricant market. In 2013, Great Wall and Kunlun seized 51.2% market share together, while foreign companies grasped 29.9%.



At the same time, Chinese private lubricant companies also showed their strengths to take places in the fiercely competitive Chinese lubricant market, such as Delian Group, Tech petrochemical and Sure Energy Tech.

Delian Group has established long-term stable cooperative relations with upstream and downstream enterprises through “parts production bases near downstream vehicle plants”. Currently, the company has four bases in Changchun, Shanghai, Chengdu and Foshan, and has become the designated lubricant supplier of Shanghai Volkswagen, FAW-Volkswagen, Shanghai GM and many other well-known automakers.

Gaoke Petrochemical, one of important suppliers of transformer oil, serves XCMG, Qianjiang Electric, Shenda Electric and CNC Electric. Through the elimination of backward capacity, equipment modification, building of new plants and other measures, the company’s total lubricant capacity amounted to 121,600 tons at the end of 2013. But due to the decreasing demand for downstream transformers and other factors, the company’s capacity utilization rate was only 80.6% at that time.

The report highlights:

- Market supply & demand, competition pattern, import & export of China lubricant industry;
- Market supply & demand, competition pattern, import & export of raw materials (base oil and additive) of China lubricant industry;
- Status quo, policies and regulations, regeneration projects, supply and demand of China waste lubricant recycling market;
- Operation and lubricant business of 8 global and 8 Chinese lubricant companies.

In recent years, China has attached more importance to the recycling of waste lubricant, and issued a series of favorable policies. However, China only recycles and reuses 6% -8% of lubricant. In theory, China's annual output of waste lubricant hit 3 million tons or more, embodying huge development potentials. At present, a number of waste lubricant regeneration projects are under construction or go into operation, such as Baosteel's 7,000 t/a waste lubricant project, Fujian Sanming Steel's waste lubricant regeneration project, Tangshan You Yi Sheng Xing's 60,000 t/a waste lubricant regeneration project.

1. Overview of Lubricant and Lubricant Base Oil

- 1.1 Definition of Lubricant
- 1.2 Major Lubricant
 - 1.2.1 Internal Combustion Engine Oil
 - 1.2.2 Gear Oil
 - 1.2.3 Hydraulic Oil

2. Development of China Lubricant Market

- 2.1 International Market Environment
 - 2.1.1 Overview
 - 2.1.2 Crude Oil Market
- 2.2 Domestic Market Environment
 - 2.2.1 Supply
 - 2.2.2 Demand
 - 2.2.3 Macroeconomic Environment
- 2.3 Import and Export
 - 2.3.1 Import
 - 2.3.2 Export
- 2.4 Competition Pattern

3. Overview of Chinese Lubricant Upstream Industries

- 3.1 Base Oil
 - 3.1.1 Supply & Demand
 - 3.1.2 Competition Pattern
 - 3.1.3 Import & Export
- 3.2 Additive

4. Overview of Chinese Waste Lubricant Recovery Market

- 4.1 Policies and Regulations
- 4.2 Current Development
- 4.3 Regeneration Projects
- 4.4 Supply & Demand

5. Global Suppliers

- 5.1 Shell
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Lubricant Business in China
 - 5.1.4 Shell Tongyi
- 5.2 BP
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 BP Lubricant
 - 5.2.4 Lubricant Business in China
- 5.3 ExxonMobil
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Lubricant Business
 - 5.3.4 Lubricant Business in China
- 5.4 Chevron
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Lubricant Business in China
- 5.5 Total

- 5.5.1 Profile
- 5.5.2 Operation
- 5.5.3 Lubricant Business in China
- 5.6 FUCHS
 - 5.6.1 Profile
 - 5.6.2 Lubricant Business in China
- 5.7 ASHLAND
 - 5.7.1 Profile
 - 5.7.2 Operation
 - 5.7.3 Lubricant Business in China
- 5.8 ConocoPhillips
 - 5.8.1 Profile
 - 5.8.2 Operation
 - 5.8.3 Lubricant Business in China

6. Chinese Producers

- 6.1 CNPC
 - 6.1.1 Profile
 - 6.1.2 Operation
 - 6.1.3 Revenue Structure
 - 6.1.4 Gross Margin
 - 6.1.5 Lubricant Business
 - 6.1.6 Forecast and Outlook
- 6.2 Sinopec
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 Revenue Structure
 - 6.2.4 Gross Margin

6.2.5 Lubricant Business	6.6 Sure Energy Tech.
6.2.6 Forecast and Outlook	6.6.1 Profile
6.3 Delian Group	6.6.2 Operation
6.3.1 Profile	6.6.3 Gross Margin
6.3.2 Operation	6.6.4 Supply and Marketing
6.3.3 Revenue Structure	6.7 Other Enterprises
6.3.4 Gross Margin	6.7.1 Lopal
6.3.5 Lubricant Business	6.7.2 Lidi
6.3.6 R & D and Investment	
6.3.7 Forecast and Outlook	7. Forecast and Outlook
6.4 Gaoke Petrochemical	7.1 Prediction of Lubricant Output
6.4.1 Profile	7.2 Performance Comparison between Major Companies
6.4.2 Operation	7.2.1 Revenue
6.4.3 Revenue Structure	7.2.2 Net Income
6.4.4 Gross Margin	7.2.3 Gross Margin
6.4.5 R & D	
6.4.6 Capacity, Output and Sales Volume	
6.4.7 Procurement	
6.4.8 Forecast and Outlook	
6.5 Copton	
6.5.1 Profile	
6.5.2 Operation	
6.5.3 Revenue Structure	
6.5.4 Gross Margin	
6.5.5 R & D	
6.5.6 Capacity, Output and Sales Volume	
6.5.7 Supply and Marketing	
6.5.8 Forecast and Outlook	

- Classification Criteria of API-1509 Base Oil
- Classification and Code of Q/SHR001-95 Lubricant Base Oil
- Consumption Structure of Global Lubricant Market (by Application), 2013
- Global Lubricant Demand and YoY Change, 2004-2013
- Lubricant Demand Proportion in Major Regions of the World, 2013
- Lubricant Output and YoY Growth Rate in China, 1990-2013
- Output of Major Lubricant Producing Areas in China (by Province/Municipality), 2008-2013
- Apparent Consumption of Lubricant and YoY Growth Rate in China, 2009-2013
- Engel Coefficient of Urban and Rural Households in China, 1980-2013
- China's Lubricant Market Share, 2013
- Capacity of Major Lubricant Enterprises in China, 2013
- Prefilled Lubricant and 4S After-service Lubricant Brands of Some Automobile Companies in China
- Proportion of Base Oil Types Worldwide (by Capacity), 2013
- China's Top 10 Base Oil Import Sources (by Import Volume), 2013
- China's Top 10 Base Oil Export Destinations (by Export Volume), 2013
- China's Lubricant Additive Consumption Structure (by Application)
- China's Lubricant Additive Import Volume and Value, 2013
- China's Lubricant Additive Export Volume and Value, 2013
- China's Top 10 Lubricant Additive Export Destinations and Export Volume, 2013
- China's Theoretical Waste Lubricant Supply, 2009-2013
- Shell's Revenue and Net Income, 2011-2013
- Shell's Lubricant Brands and Average Price, 2012-2013
- Tongyi's Lubricant Brands and Average Price, 2012-2013
- BP's Revenue and Net Income, 2011-2013
- Castrol's Lubricant EBIT, 2011-2013

- Castrol's Main Automotive Lubricant Products and Average Price, 2012-2013
- Major Industrial Lubricant Brands and Average Price of Castrol and BP, 2012-2013
- Exxon Mobil's Revenue and Net Income, 2009-2013
- Exxon Mobil's Lubricant Applications and Products
- Mobil's Lubricant Brands and Average Price, 2012-2013
- Chevron's Revenue and Net Income, 2009-2013
- Lubricant Product Series of Chevron Caltex
- Chevron's Lubricant Brands and Average Price, 2012-2013
- Total's Revenue and Net Income, 2009-2013
- Total's Lubricant Brands and Average Price, 2012-2013
- Development Course of FUCHS in China
- Lubricant Product Structure of FUCHS (China)
- Some Lubricant Downstream Customers of FUCHS
- Lubricant Brands and Average Price of FUCHS, 2012-2013
- Ashland's Revenue and Net Income, 2009-2013
- Valvoline's Major Lubricant Brands and Average Price, 2012-2013
- Revenue and Net Income of ConocoPhillips, 2009-2013
- Major Lubricant Products and Average Price of ConocoPhillips, 2012-2013
- CNPC's Revenue and Net Income, 2009-2013
- CNPC's Revenue (by Region), 2009-2013
- CNPC's Revenue Structure (by Region), 2009-2013
- CNPC's Gross Margin, 2009-2013
- CNPC's Gross Margin (by Business), 2009-2013
- CNPC's Lubricant Sales Volume and Average Price, 2009-2013
- CNPC's Revenue and Net Income, 2012-2016E

- Sinopec's Revenue Structure (by Business), 2009-2013
- Sinopec's Gross Margin, 2009-2013
- Sinopec's Gross Margin (by Business), 2009-2013
- Great Wall's Lubricant Product Series and Applications
- Sinopec's Revenue and Net Income, 2012-2016E
- Delian Group's Service Brands
- Delian Group's Revenue and Net Income, 2009-2013
- Delian Group's Revenue (by Region), 2009-2013
- Delian Group's Revenue Structure (by Region), 2009-2013
- Delian Group's Gross Margin, 2009-2013
- Delian Group's Lubricant Product Revenue and % of Total Revenue, 2009-2012
- Delian Group's R & D Costs and % of Total Revenue, 2012-2013
- Distribution of Delian Group's Parts Production Bases near Downstream Vehicle Plants
- Delian Group's Revenue and Net Income, 2012-2016E
- Gaoke Petrochemical's Revenue and Net Income, 2009-2013
- Gaoke Petrochemical's Revenue (by Product), 2011-2013
- Gaoke Petrochemical's Revenue (by Region), 2011-2013
- Gaoke Petrochemical's Revenue Structure (by Product), 2011-2013
- Gaoke Petrochemical's Revenue Structure (by Region), 2011-2013
- Gaoke Petrochemical's Gross Margin, 2009-2013
- Gaoke Petrochemical's Gross Margin (by Product), 2009-2013
- Gaoke Petrochemical's R & D Costs and % of Total Revenue, 2011-2013
- Gaoke Petrochemical's Capacity and Output, 2011-2013
- Gaoke Petrochemical's Output and Sales Volume (by Product), 2011-2013
- Gaoke Petrochemical's Base Oil Procurement, 2011-2013

- Gaoke Petrochemical's Revenue and Net Income, 2012-2016E
- Copton's Revenue and Net Income, 2011-2013
- Copton's Revenue (by Product), 2011-2013
- Copton's Revenue (by Region), 2011-2013
- Copton's Revenue Structure (by Product), 2011-2013
- Copton's Revenue Structure (by Region), 2011-2013
- Copton's Gross Margin, 2011-2013
- Copton's Gross Margin (by Product), 2011-2013
- Copton's R & D Costs and % of Total Revenue, 2011-2013
- Copton's Capacity, Output and Sales Volume (by Product), 2011-2013
- Copton's Top Five Suppliers, 2011-2013
- Copton's Top Five Clients, 2011-2013
- Copton's Revenue and Net Income, 2012-2016E
- Revenue and Net Income of Sure Energy, 2010-2013
- Gross Margin of Sure Energy, 2010-2013
- Top Five Suppliers and Procurement of Sure Energy, 2010-2012
- Top Five Clients of Sure Energy, 2010-2012
- China's Lubricant Output, 2012-2016E
- Revenue of Major Companies in China Lubricant Industry, 2009-2013
- Net Income of Major Companies in China Lubricant Industry, 2009-2013
- Net Profit Margin of Major Companies in China Lubricant Industry, 2009-2013
- Gross Margin of Major Companies in China Lubricant Industry, 2009-2013

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
<i>Total</i>		

Choose type of format

- PDF (Single user license)2,250 USD
- Hard copy 2,400 USD
- PDF (Enterprisewide license)..... 3,400 USD

※ Reports will be dispatched immediately once full payment has been received.
Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- *Multi-users market reports*
- *Database-RICDB*
- *Custom Research*
- *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: