



# China Lubricant Industry Report, 2014-2018

Sep. 2015

## 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

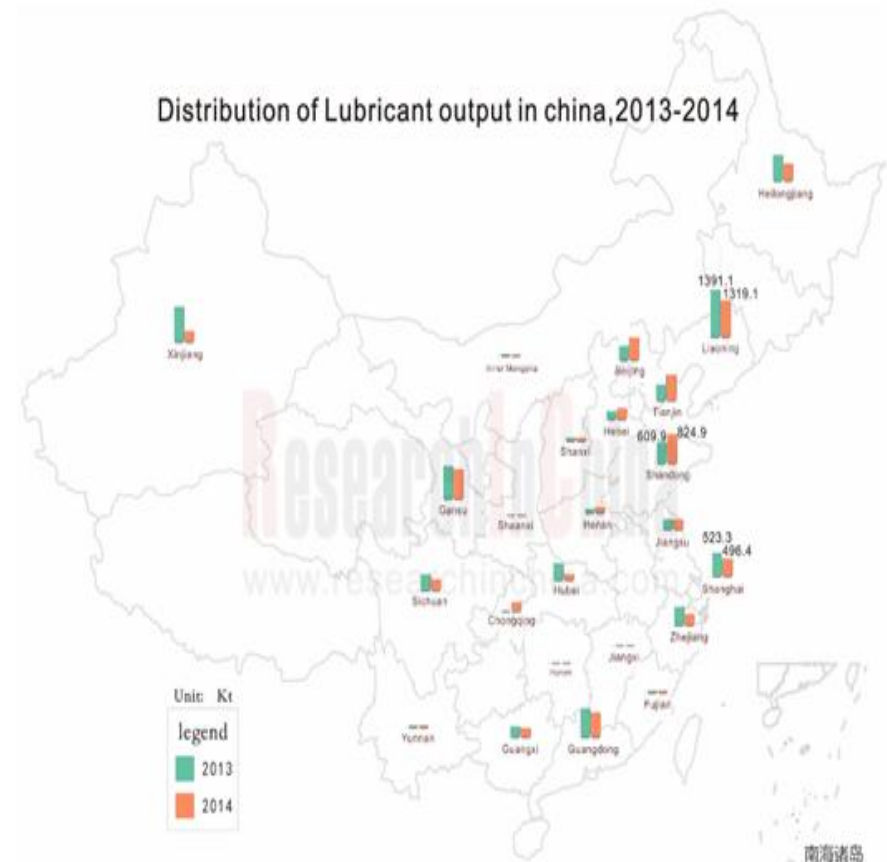
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

The development of automobiles, machinery manufacturing, electrical, and other industries in China has triggered a rapid expansion of lubricant market size. So far, China has become one of the world's major lubricant producers and consumers. However, amid the low-speed growth of the global economy, China's lubricant market continued to decline for the past two years, with 2014's lubricant output falling by 3.6% year-on-year to 5.6866 million tons.

Influenced by the distribution of resources, China's lubricant industry presents obvious regional characteristics. In 2014, Liaoning, Shandong, and Shanghai ranked among the top three by lubricant output. Among them, Liaoning produced 1.3191 million tons, accounting for 23.2% of the total nationwide, and the output of Shandong and Shanghai were recorded at 824.9 kilotons and 496.4 kilotons, respectively.

At present, China's lubricant market is dominated by state-owned, foreign-funded, private-owned enterprises. As the leaders in China's lubricant industry, Sinopec (Great Wall Lubricant) and PetroChina (Kunlun Lubricant) represented a combined 48.7% market share in 2014, while transnational petroleum corporations e.g. Shell, BP, FUCHS, and Total occupied a 29.7% share.



Source: China Lubricant Industry Report, 2014-2018 by ResearchInChina

However, with the development of oil refining industry and the improvement of marketization, base oil supply bottlenecks will be eliminated, so that the local privately-owned enterprises, through years of efforts, will also hold an important position in some Chinese lubricant market segments. The companies like Jiangsu LOPAL Tech. Co. and Guangdong Delian Group Co. are the major Chinese automotive lubricant suppliers; Jiangsu Gaoke Petrochemical Company Limited, Dongguan Anmei Lubrication Technology Co., and Shandong Yuangen Petroleum Chemical, among others, have certain competitive advantages in China's industrial lubricant market segment.

### **The report highlights the following:**

- ✘ Operation environment of China lubricant industry, including international market environment, domestic macro-economic environment, etc.;
- ✘ Development status, market supply and demand, competitive landscape, import and export, growth prediction, etc. of China lubricant industry;
- ✘ Market status, supply and demand, import and export, etc. of base oil and additives in China;
- ✘ Policies, market status, supply and demand, etc. of waste lubricants in China;
- ✘ Operation, lubricant business, development prospects, etc. of 8 global and 8 Chinese lubricant companies.

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