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Freedonia Focus Reports
US Collection

# Automotive Lubricants:
## United States

December 2017



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# About This Report

## Scope & Method

This report forecasts US automotive lubricant demand in metric tons to 2021. Total demand is segmented by product in terms of:

- engine oils
- transmission and hydraulic fluids
- gear oils and greases

Total demand is also segmented by market as follows:

- light vehicles
- medium and heavy trucks and buses
- off-highway equipment
- other automotive markets such as motorcycles, recreational vehicles, and outdoor power equipment

To illustrate historical trends, total demand is provided in annual series from 2006 to 2016; the various segments are reported at five-year intervals for 2006, 2011, and 2016.

Industrial lubricants – including engine oils, hydraulic fluids, and gear oils and greases used in industrial applications – are excluded from this report. The agriculture, construction, mining, and forestry industries all utilize both automotive and industrial lubricants. This report only includes lubricants utilized in the motor vehicle applications in those industries, and those lubricants are classified together under the off-highway equipment market.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or $r^2$. The most stable data series relative to the trend carries an $r^2$ value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Automotive Lubricants: United States* (FF35115) is based on *Global Automotive Lubricants*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 5 | Industry Codes Related to Automotive Lubricants**

| NAICS/SCIAN 2007 | | SIC | |
|---|---|---|---|
| **North American Industry Classification System** | | **Standard Industrial Classification** | |
| 324110 | Petroleum Refineries | 2869 | Industrial Organic Chemicals, NEC |
| 324191 | Petroleum Lubricating Oil and Grease Mfg | 2899 | Chemicals and Chemical Preparations, NEC |
| 325199 | All Other Basic Organic Chemical Mfg | 2911 | Petroleum Refining |
| 325998 | All Other Miscellaneous Chemical Product and Preparation Mfg | 2992 | Lubricating Oils and Greases |

Source: US Census Bureau

## Copyright & Licensing

# Resources

## The Freedonia Group

*Global Automotive Lubricants*, December 2017

**Freedonia Industry Studies**

*North America Automotive Aftermarket*, November 2017
*North America Automotive Aftermarket Competitor Analysis*, November 2017
*Global Construction Machinery*, August 2017
*Global Bus Market*, May 2017
*Automotive Aftermarket for Powertrain Components in North America*, March 2017
*Power Lawn & Garden Equipment Market in the US*, February 2017
*Global Diesel Engine Market*, January 2017
*Synthetic Lubricants & Functional Fluids Market in the US*, January 2017
*World Motorcycles*, October 2016
*Lubricants*, April 2016
*World Agricultural Equipment*, April 2016

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*Agricultural Equipment: United States*
*Construction Machinery: United States*
*Forestry Equipment: United States*
*Global Light Vehicles*
*Global Medium- & Heavy-Duty Vehicles*
*Lubricants: United States*
*Medium- & Heavy-Duty Trucks & Buses: United States*
*Motor Vehicles: United States*
*Power Lawn & Garden Equipment: United States*
*Power Transmission Components: United States*
*Recreational Vehicles: United States*
*Refined Petroleum Products: United States*
*Synthetic Lubricants & Functional Fluids: United States*
*Transport Equipment: United States*
*World Diesel Engines*
*World Motorcycles*

**Freedonia Custom Research**

## Trade Publications

*Lubes 'n' Greases*
*Lube Report*
*2017-2018 Lubricants Industry Factbook* (and earlier editions)

*Lubezine*
*National Oil & Lube News*
*Oil & Gas Journal*

## Agencies & Associations

American Petroleum Institute
ASTM International
Independent Lubricant Manufacturers Association
International Lubricants Standardization and Approval Committee
Mine Safety and Health Administration
Occupational Safety and Health Administration
SAE International
United States Census Bureau
United States Department of Agriculture
United States Department of Transportation
United States Environmental Protection Agency
United States Food and Drug Administration
United States International Trade Commission