LUBRICANT ADDITIVES MARKET

BY FUNCTION TYPE (Dispersants, VII, Detergents, Antiwear, Antioxidants, Corrosion Inhibitors, Emulsifiers, & Others) & APPLICATION (Automotive & Industrial Lubricants)

— Global Trends & Forecast to 2019
MarketsandMarkets is a global market research and consulting company based in the U.S. We publish strategically analyzed market research reports and serve as a business intelligence partner to Fortune 500 companies across the world. MarketsandMarkets also provides multi-client reports, company profiles, databases, and custom research services.

MarketsandMarkets covers fourteen industry verticals, including aerospace & defence, advanced materials, automotives and transportation, banking and financial services, biotechnology, chemicals, consumer goods, energy and power, food and beverages, industrial automation, medical devices, pharmaceuticals, semiconductor and electronics, and telecommunications and IT.

Copyright © 2014 MarketsandMarkets
All Rights Reserved. This document contains highly confidential information and is the sole property of MarketsandMarkets. No part of it may be circulated, copied, quoted, or otherwise reproduced without the approval of MarketsandMarkets.
1  PREMIUM INSIGHTS

1.1  MARKET SEGMENTATION

1.1.1  HEAVY DUTY MOTOR OIL, THE LARGEST END-USER APPLICATION FOR LUBRICANT ADDITIVES

In terms of applications, automotive lubricants, specifically heavy duty motor oil dominated the consumption of lubricant additives

![Lubricant Additives Growth Matrix](Sample)

2 MARKET OVERVIEW

2.1 INTRODUCTION

2.1.1 DUAL CLUTCH TECHNOLOGY (DCT): THE GAME CHANGER

Dual Clutch Technology accompanies high performance, more powerful, and smooth transmission technology, improved fuel efficiency and reduced carbon emissions. It is expected that dual clutch technology would result in XX-XX percent cut in fuel consumption, contributing to environment restoration.

The Dual Clutch Technology works on advanced transmission, requiring specifically formulated lubricant additives, to reach its full potential. Thus, it is a challenge, as well as an opportunity, to develop specialized additive technology and formulate superior quality lubricants complying with the DCT specifications.

As per the statistics available, the Dual Clutch Technology would have a market penetration of about XX% by 2020 for all passenger vehicles in Western and Central Europe. The table below shows the number of DCT vehicles in Western and Central Europe in 2012, 2016, and 2020.
TABLE 1

LIGHT DUTY VEHICLE PRODUCTION IN WESTERN AND CENTRAL EUROPE

<table>
<thead>
<tr>
<th></th>
<th>2012</th>
<th>2016</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Vehicle Production</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Vehicles fitted with DCTs</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>DCT penetration (%)</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
</tbody>
</table>

Source: Car-engineer Website

As per the industry experts, it is expected that DCTs would account for XX% to XX% share of the overall transmissions market by 2020 with approximately XX to XX million vehicles with DCT. China and India are expected to be potential DCT markets by 2020.
3 LUBRICANT ADDITIVES MARKET, BY TYPE

3.1 INTRODUCTION

Additives have been developed to increase engine durability and efficiency in automotive and corrosion inhibition, friction reduction, and withstand extreme pressures in the industrial sector. Over the years, various hybrid compounds and blends have been engineered to create better additives for lubricants.

This chapter analyzes the lubricant additives market and its trends with respect to ten types of additives, namely dispersants, VII (viscosity index improvers), detergents, antiwear, antioxidants, corrosion inhibitors, emulsifiers, friction modifiers, EP (extreme pressure), PPDs (pour point dispersants), and others. The figure below gives estimates for type-wise volume of fuel additives for the year 2013.

LUBRICANT ADDITIVES MARKET SHARE (VOLUME), BY TYPE, 2013

Source: ATC-Europe, Lube-Media, Lubesngreases, Fuelsandlubes, Factiva, Company Websites and Annual Reports, Expert Interviews, and MarketsandMarkets Analysis
Deposit control additives are used in almost all types of lubricants, due to which, they are the dominant additives in terms of market size. They captured around XX% of the market share in 2013. Viscosity index improvers (VII) are second with XX% market share. Detergents are third with XX% market share.

### TABLE 2

**TYPES OF LUBRICANT ADDITIVES & THEIR CHEMICAL COMPOSITION**

<table>
<thead>
<tr>
<th>Additive Type</th>
<th>Components Made</th>
</tr>
</thead>
<tbody>
<tr>
<td>Detergent</td>
<td>Sulfonates, phosphonates, alkyl phenates, alkyl carboxylates alkyl substituted salicylates combined with barium, magnesium, zinc, calcium or sodium</td>
</tr>
<tr>
<td>Dispersant</td>
<td>Alkenyl succinimides, succinate esters, alkyl-acrylic polymers, ashless compounds</td>
</tr>
<tr>
<td>Viscosity Index Improver</td>
<td>Polyisobutylene, polymethacrylates, styrene-diene copolymers, styrene polyesters, polyacrylates, and olefin copolymers</td>
</tr>
<tr>
<td>Antiwear</td>
<td>Chlorinated waxes, alkyl phosphites and phosphates, lead naphthenate, metal triborates, metal and ashless dithiophosphates</td>
</tr>
<tr>
<td>Antioxidant</td>
<td>Alkyl sulfides, alkyl phosphites, aromatic amines, alkyl phenols, metal dithiophosphates and metal dithiocarbamates</td>
</tr>
<tr>
<td>Corrosion Inhibitor</td>
<td>Metal dithiophosphates, metal dithiocarbamates, metal sulfonates, thia diazoles, and sulfurized terpenes</td>
</tr>
<tr>
<td>Friction Modifiers</td>
<td>Fatty acids, fatty amides, and fatty alcohols</td>
</tr>
<tr>
<td>Extreme Pressure</td>
<td>Alkyl sulfides, polysulfides, sulfurized and/or chlorinated fatty oils, chlorinated paraffinic waxes, alkyl phosphites and phosphates, metal and ashless dithiophosphates, and carboxylates, metal dithiocar bamates, and metal triborates</td>
</tr>
<tr>
<td>Pour Point Depressant</td>
<td>Polymethacrylates, polyfumarates, polystyrene esters, alkylsilicates, polyacrylamides, alkylated naphthalenes and</td>
</tr>
</tbody>
</table>
### Additive Type

<table>
<thead>
<tr>
<th>Components Made</th>
</tr>
</thead>
<tbody>
<tr>
<td>oligomerized alkyl phenols</td>
</tr>
</tbody>
</table>

Source: Secondary Research, Company Website and MarketsandMarkets Analysis
4 LUBRICANT ADDITIVES MARKET, BY GEOGRAPHY

4.1 INTRODUCTION

This chapter analyzes the lubricant additives market and its trends with respect to five geographies, namely Asia-Pacific, North America, Latin America, Europe, and Middle East & Africa. Asia-Pacific accounts for the maximum market share for the lubricant additives market due to high automotive and industrial activities in the region, especially in the developing nations, such as, China and India.

In 2014, Asia-Pacific accounts for XX% market share which is closely followed by North America with XX% and Europe with XX%. Latin America and Middle East & Africa have nearly same market share, XX% and XX% respectively. The same trend is expected to continue till 2019 with Asia-Pacific leading the market with its share rising to XX%. In a similar fashion, North America will be the second largest market with XX% share followed by Europe with...
XX%. Latin America, and Middle East & African markets will remain at the same level with marginal increase in their market shares from 2014.
5  COMPETITIVE LANDSCAPE

5.1  STRATEGIC DEVELOPMENTS

FIGURE 4

COMPETITIVE DEVELOPMENTS, BY GROWTH STRATEGY, 2010-2013

Source: Company Press Release, Factiva, and MarketsandMarkets Analysis

5.1.1  MAXIMUM DEVELOPMENTS IN 2011

The year 2011 witnessed the maximum developments by companies. The year witnessed a variety of approaches adopted by different companies round the year. It included the mix of expansion, new product development, acquisition, R&D, and partnerships as well. There were a total of XX developments in 2011, out of XX over the complete period (Jan 2010 to March 2014). In 2012 and 2013, expansion and new product development were the most opted approaches undertaken by the companies to ensure technical and product innovation and strengthened consumer reach.
Disclaimer: MarketsandMarkets strategic analysis services are limited publications containing valuable market information provided to a select group of customers in response to orders. Our customers acknowledge, when ordering, that MarketsandMarkets strategic analysis services are for our customers’ internal use and not for general publication or disclosure to third parties. Quantitative market information is based primarily on interviews and therefore, is subject to fluctuation.

MarketsandMarkets does not endorse any vendor, product or service depicted in its research publications. MarketsandMarkets strategic analysis publications consist of the opinions of MarketsandMarkets' research and should not be construed as statements of fact. MarketsandMarkets disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

MarketsandMarkets takes no responsibility for any incorrect information supplied to us by manufacturers or users.

All trademarks, copyrights and other forms of intellectual property belong to their respective owners and may be protected by copyright. Under no circumstance may any of these be reproduced in any form without the prior written agreement of their owner.

No part of this strategic analysis service may be given, lent, resold or disclosed to non-customers without written permission.

Reproduction and/or transmission in any form and by any means including photocopying, mechanical, electronic, recording or otherwise, without the permission of the publisher is prohibited.

For information regarding permission, contact:
Tel: 1-888-600-6441
Email: sales@marketsandmarkets.com