



AUTOMOTIVE LUBRICANTS AFTERMARKET GCC & LEVANT -REGIONAL OVERVIEW

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EXECUTIVE SUMMARY

- **The GCC** lubricants aftermarket is large, resilient, and increasingly premium-driven
- **High operating temperatures** and **modern engines** are accelerating the shift to synthetic and OEM-approved lubricants
- **The Levant** represents a smaller but strategic aftermarket, driven by aging vehicle fleets and high service dependency
- **Winning strategies differ:** scale and approvals in GCC; agility and value positioning in the Levant

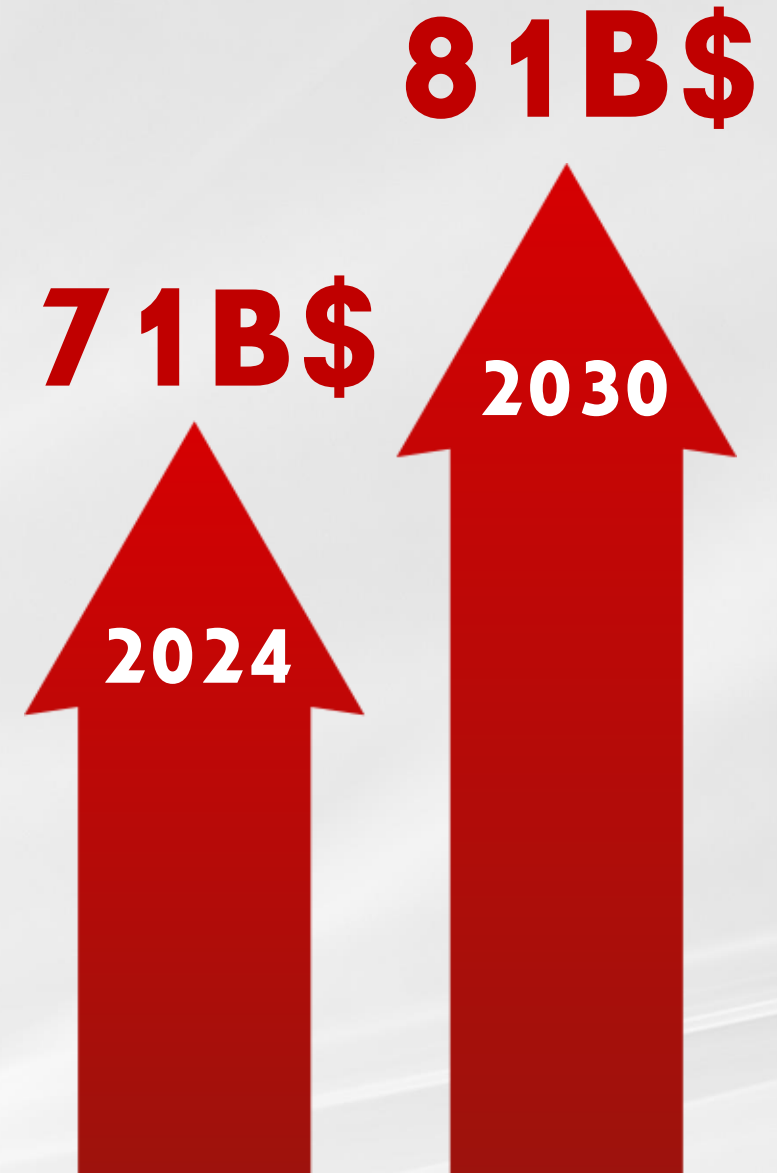
MARKET SIZE & GROWTH

- Regional automotive lubricants aftermarket valued at ~**USD 71 billion (2024)**
- Expected to exceed **USD 81 billion by 2030**
- Forecast CAGR of approximately **2–2.5%**
- Growth is **value-led** rather than **volume-led**

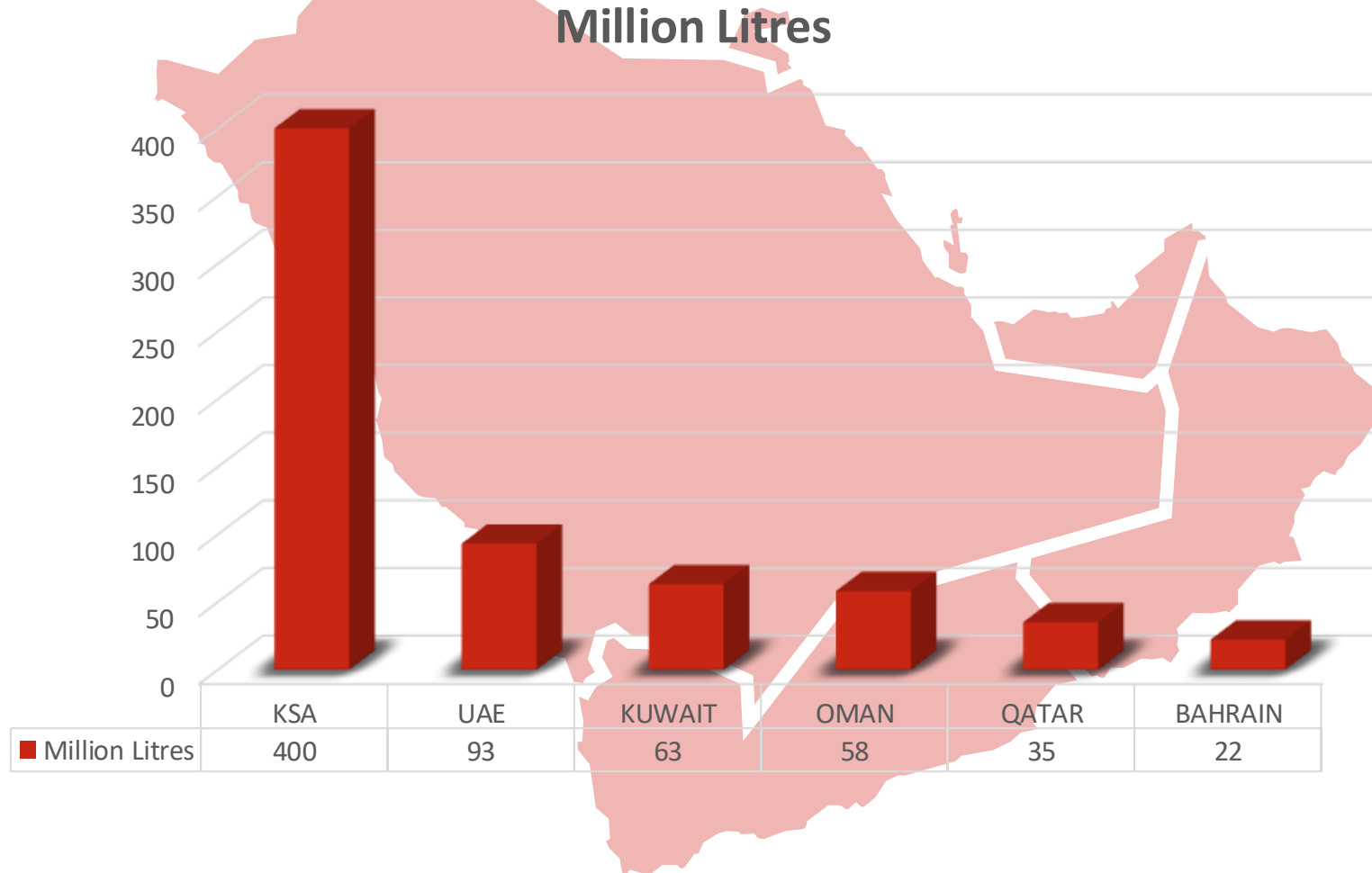


KEY DRIVERS:

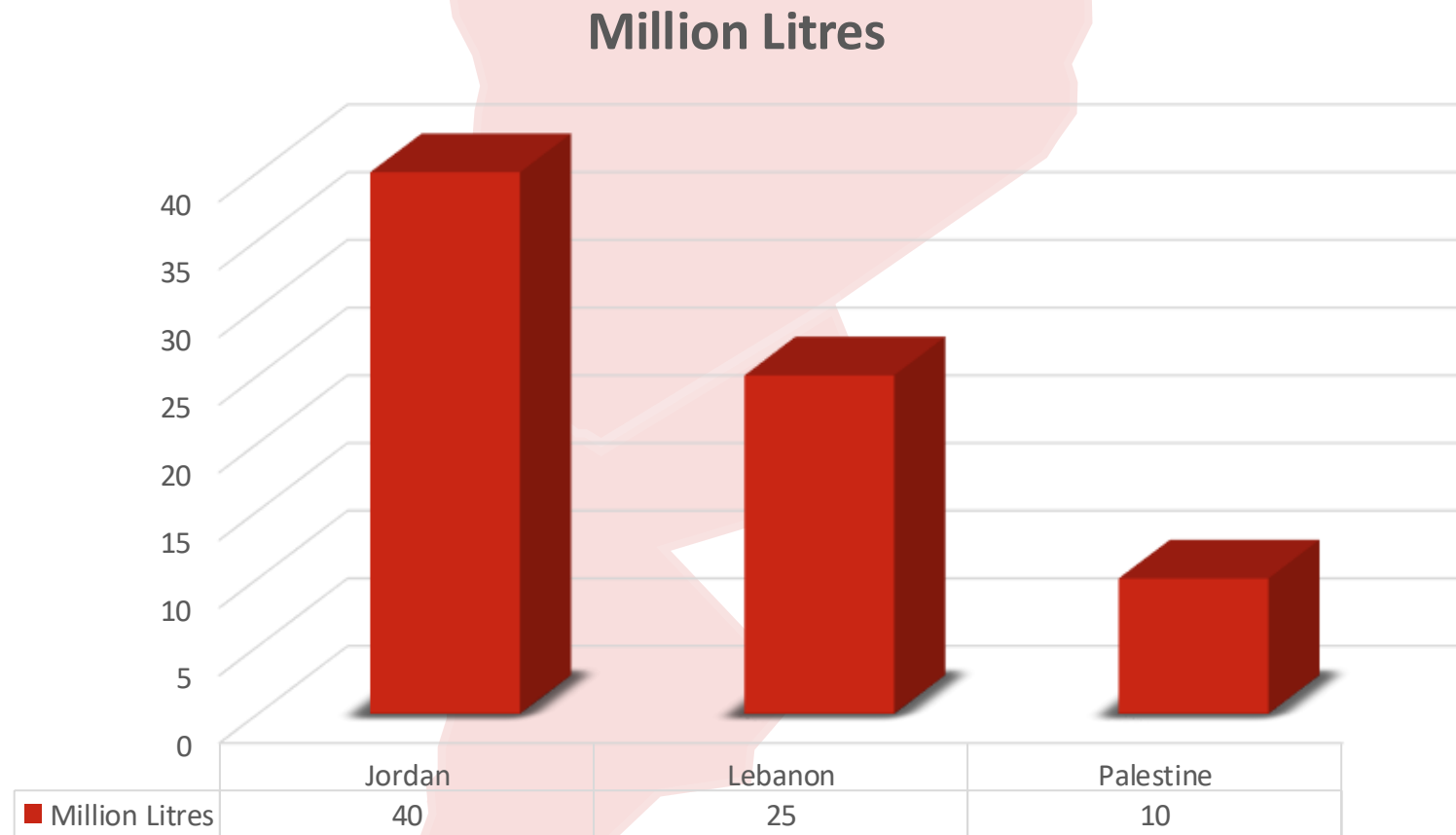
Vehicle parc growth, logistics & fleets, climate impact, infrastructure investment



MARKET SIZE – GCC (estimated)



MARKET SIZE – Levant (estimated)



MARKET SEGMENTATION – PRODUCTS



Passenger Car Motor Oils (PCMO):

Largest segment; strong shift to synthetics and low-viscosity grades



Heavy-Duty Motor Oils (HDMO):

Driven by fleets, logistics, and commercial vehicles



Industrial Lubricants:

Supported by construction and infrastructure projects



Specialty Products:

Greases, coolants, and emerging EV-related fluids



KEY INSIGHT:

Value growth is concentrated in synthetic and high-performance lubricants

MARKET SEGMENTATION – CHANNELS



Workshops & Service Centres:

Core channel for aftermarket lubricant consumption



Distributors:

Critical link between brands and fragmented markets



Direct Sales & Fleets:

Increasing importance, especially in the GCC



Retail:

Relevant for passenger cars, particularly outside major cities



Online Platforms:

Growing influence but still complementary

REGIONAL SPECIFICS & MARKET DRIVER

LEVANT

- Older vehicle fleets and higher maintenance frequency
- Fragmented markets with strong workshop influence
- Demand remains resilient despite economic pressure

GCC

- Large-scale infrastructure and industrial activity
- Strong fleet, rental, and logistics sectors
- High thermal stress driving performance lubricant demand

KEY PLAYERS



Global Majors:

Shell, BP Castrol, ExxonMobil, TotalEnergies, Valvoline



National Oil Companies:

Saudi Aramco, ADNOC, ENOC



Regional & Specialty Players:

FUCHS, Liqui Moly, Petromin, regional blenders



Market Reality:

Scale and approvals dominate the GCC, while distribution reach and trust drive success in the Levant

MARKET DYNAMICS

LEVANT MARKET DYNAMICS

- Economic volatility increases price competition
- Highly fragmented distribution landscape
- Opportunities for agile, locally focused players

GCC MARKET DYNAMICS

- Expanding vehicle fleet and tourism-driven demand
- OEMs pushing higher-spec, fuel-efficient lubricants
- Premiumization accelerating across all segments

KEY LUBRICANTS AFTERMARKET TRENDS 2026



Premiumization over volume growth



Shift toward low-viscosity, high-efficiency oils (0W & 5W grades)



EV transition reshaping fluid demand, not eliminating it



Channel **consolidation** and strategic **partnerships**



Brand trust, traceability, and anti-counterfeit measures **gaining importance**



THANK YOU

Rami Sahawneh - Lubricants Expo Dubai 2026