



Lubricant Market Statistics Third Quarter - 2020

Public Utilities Commission of Sri Lanka

Shadow Regulator of the Lubricant Market
















AS THE SHADOW REGULATOR OF THE LUBRICANT AND GREASE
MARKET,

THE PUBLIC UTILITIES COMMISSION OF SRI LANKA
COLLECTS, RECORDS AND DISSEMINATES LUBRICANT MARKET
OPERATIONAL INFORMATION.

THIS DOCUMENT PROVIDES AN OVERVIEW OF THE LUBRICANT
AND GREASE MARKET IN SRI LANKA AND SUMMARIZES THE
OPERATIONAL INFORMATION
OF THE THIRD QUARTER OF YEAR 2020

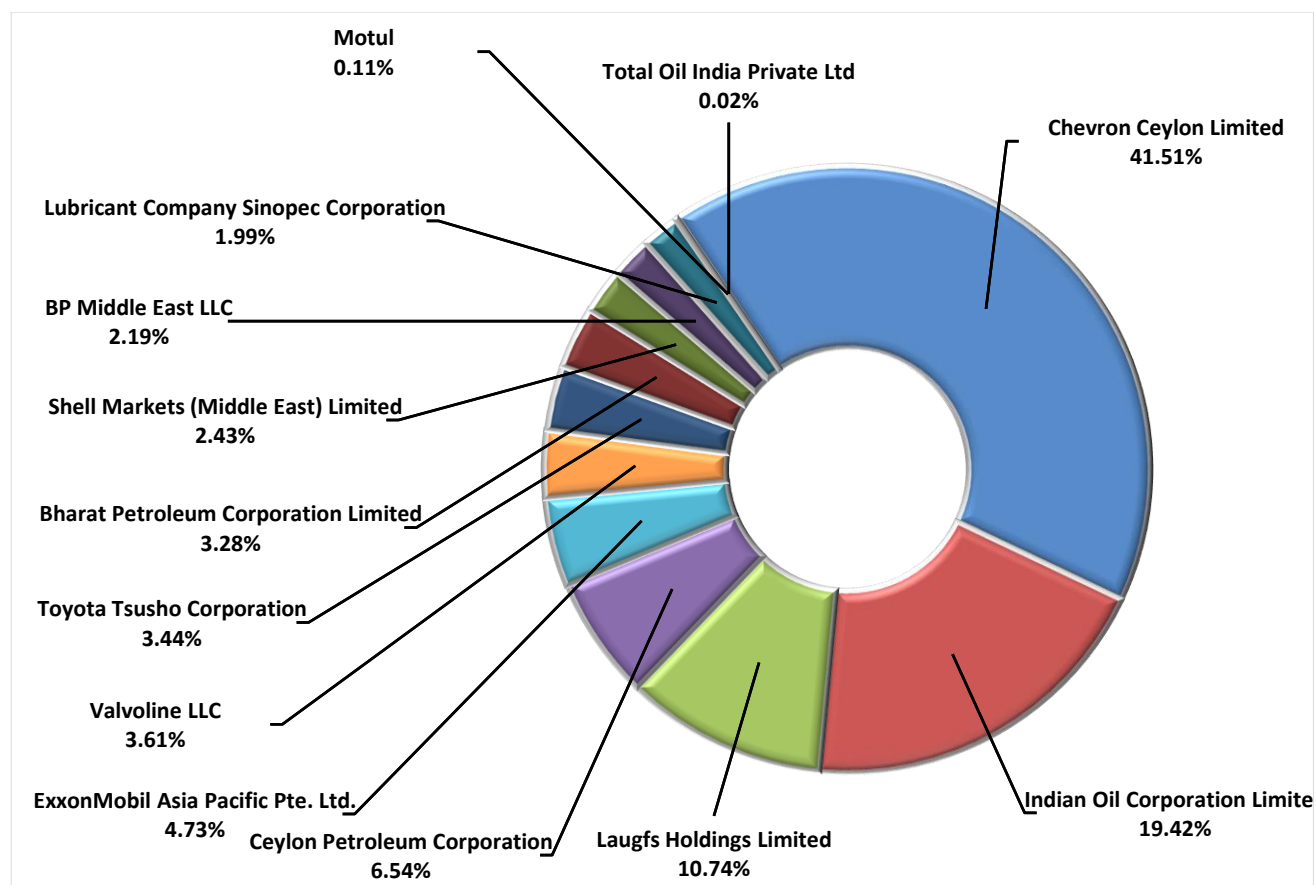
Market Participants

Presently there are eleven (11) parties authorized to import, export, sell, supply or distribute lubricants (Activity 2) and four (4) parties are authorized to import, export, blend, produce, sell, supply or distribute lubricants (Activity 1) as indicated below (with respect to Hyrax brand, authority is granted only to blend produce and export).

Company	Nominee	Brand (s)	Activity
Bharath Petroleum Corporation Limited	TVS Lanka (Pvt) Limited	 (MAK)	Activity 2
BP Middle East LLC	Associated Motorways Limited	 (BP, Castrol)	Activity 2
Ceylon Petroleum Corporation		 (Ceypetco, Hyrax)	Activity 1
Chevron Ceylon Limited	Chevron Lubricants Lanka PLC	 (Caltex, Chevron, Texaco, Lanka)	Activity 1
ExxonMobil Asia Pacific Pte. Limited	McLarens Lubricants Limited	 (ExxonMobil, Esso, Mobil, Cat)	Activity 2
Gulf Oil Middle East Limited	Lanka Ashok Leyland PLC	 (Gulf)	Activity 2
	Gulf Synergy Lanka (Private) Limited		
Indian Oil Corporation	Lanka IOC PLC	 (Servo)	Activity 1
Laugfs Holdings Limited	Laugfs Lubricants Limited	 (Laugfs)	Activity 1
Lubricant Company Sinope Corporation	Interocean Lubricants Limited	 (Greatwall, Sinopec)	Activity 2
Motul	Transmec International	 (Motul)	Activity 2
	Spectrum Trading Company (Private) Limited		
Petronas Lubricants (India) Private Limited	Global Capital Holdings (Pvt) Limited	 (Petronas)	Activity 2
Shell Markets (Middle East) Limited	N. M. Distributors (Pvt) Limited	 (Shell)	Activity 2
Total Oil India Private Limited	Navaloka Petroleum (Pvt) Limited	 (Total, Elf)	Activity 2
Toyota Tsusho Corporation	Toyota Lanka (Pvt) Limited	 (Toyota)	Activity 2
Valvoline LLC	United Motors Lanka Limited	 (Valvoline)	Activity 2

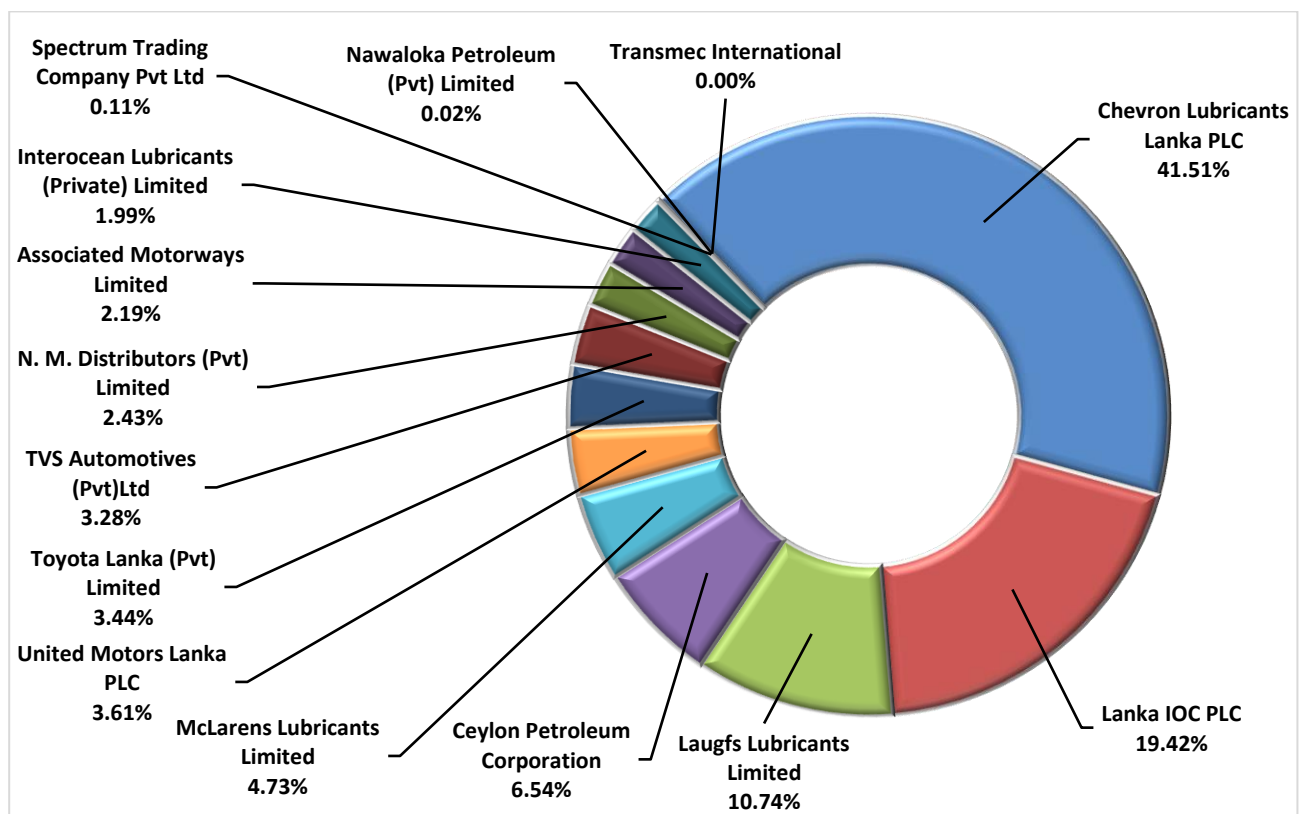
Company wise Lubricant Sales Quantity

Company	LUBRICANT SALES QUANTITY – 2020 THIRD QUARTER	
	kL	%
Chevron Ceylon Limited	7,524.91	41.51
Indian Oil Corporation Limited	3,520.96	19.42
Laugfs Holdings Limited	1,947.19	10.74
Ceylon Petroleum Corporation	1,185.80	6.54
ExxonMobil Asia Pacific Pte. Ltd.	857.03	4.73
Valvoline LLC	653.64	3.61
Toyota Tsusho Corporation	623.93	3.44
Bharat Petroleum Corporation Limited	593.76	3.28
Shell Markets (Middle East) Limited	440.03	2.43
BP Middle East LLC	396.30	2.19
Lubricant Company Sinopec Corporation	361.16	1.99
Motul	20.31	0.11
Total Oil India Private Ltd	3.53	0.02
Total	18,128.56	100.00



Nominee wise Lubricant Sales Quantity

Nominee	LUBRICANT SALES QUANTITY – 2020 THIRD QUARTER	
	kL	%
Chevron Lubricants Lanka PLC	7,524.91	41.51
Lanka IOC PLC	3,520.96	19.42
Laugfs Lubricants Limited	1,947.19	10.74
Ceylon Petroleum Corporation	1,185.80	6.54
McLarens Lubricants Limited	857.03	4.73
United Motors Lanka PLC	653.64	3.61
Toyota Lanka (Pvt) Limited	623.93	3.44
TVS Automotives (Pvt)Ltd	593.76	3.28
N. M. Distributors (Pvt) Limited	440.03	2.43
Associated Motorways Limited	396.30	2.19
Interocean Lubricants (Private) Limited	361.16	1.99
Spectrum Trading Company Pvt Ltd	19.98	0.11
Nawaloka Petroleum (Pvt) Limited	3.53	0.02
Transmec International	0.33	0.00
Total	18,128.56	100.00



Company wise Annual Lubricant Sales Quantity (2016 to 2019)

Company	ANNUAL LUBRICANT SALES QUANTITY							
	2019		2018		2017		2016	
	kL	%	kL	%	kL	%	kL	%
Chevron Ceylon Limited	25,842.62	41.36	23,987.00	37.32	25,721.00	39.89	29,251.30	45.29
Indian Oil Corporation Limited	7,848.61	12.56	11,316.17	17.61	10,969.60	17.01	10,590.26	16.40
Laugfs Holdings Limited	6,309.86	10.10	5,775.00	8.99	4,949.56	7.68	3,419.59	5.29
ExxonMobil Asia Pacific Pte. Limited	5,683.75	9.10	4,959.08	7.72	3,534.70	5.48	3,105.96	4.81
Bharat Petroleum Corporation Limited	4,045.00	6.47	3,584.00	5.58	3,452.00	5.35	3,710.27	5.74
Ceylon Petroleum Corporation	3,542.42	5.67	4,071.49	6.34	5,411.60	8.39	5,445.90	8.43
Toyota Tsusho Corporation	2,421.63	3.88	2,398.13	3.73	2,110.00	3.27	1,911.99	2.96
Shell Markets (Middle East) Limited	1,856.72	2.97	2,330.68	3.63	1,898.34	2.94	1,290.11	2.00
Valvoline LLC	1,686.69	2.70	1,525.48	2.37	1,949.84	3.02	1,869.49	2.89
Lubricant Company Sinopec Corporation	1,565.60	2.51	1,975.00	3.07	1,986.00	3.08	1,569.20	2.43
BP Middle East LLC	1,322.01	2.12	1,496.20	2.33	1,639.54	2.54	1,693.26	2.62
Total Oil India Private Limited	264.75	0.42	720.87	1.12	720.89	1.12	593.12	0.92
Motul	91.80	0.15	127.58	0.20	141.91	0.22	134.88	0.21
Total	62,481.46	100.00	64,266.67	100.00	64,484.98	100.00	64,585.33	100.00

Company wise Lubricant Sales Values

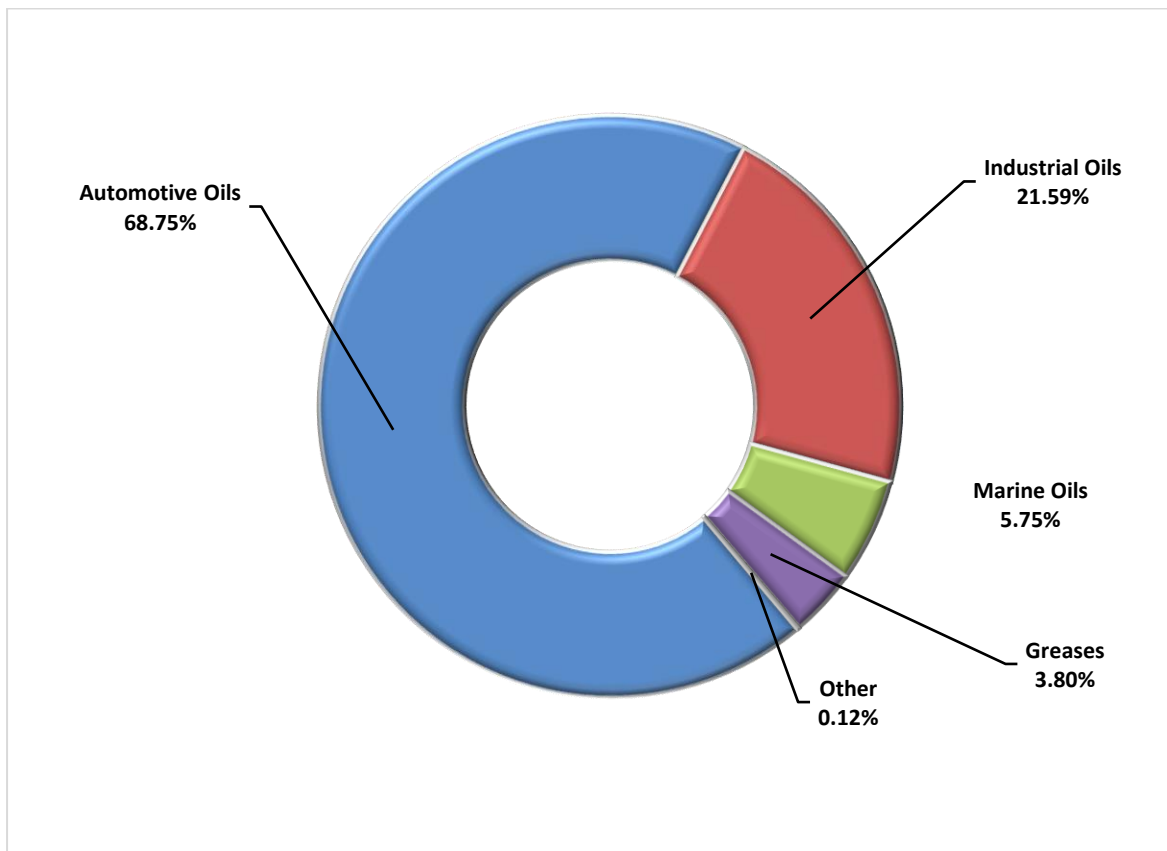
Company	LUBRICANT SALES VALUES - 2020 THIRD QUARTER	
	LKR Million	%
Chevron Ceylon Limited	3,235.80	38.14
Indian Oil Corporation Limited	1,050.63	12.38
Toyota Tsusho Corporation	815.82	9.62
Laugfs Holdings Limited	683.51	8.06
ExxonMobil Asia Pacific Pte. Ltd.	585.44	6.90
Ceylon Petroleum Corporation	468.63	5.52
Valvoline LLC	396.68	4.68
BP Middle East LLC	373.87	4.41
Bharat Petroleum Corporation Limited	339.87	4.01
Shell Markets (Middle East) Limited	332.76	3.92
Lubricant Company Sinopec Corporation	176.27	2.08
Motul	21.49	0.25
Total Oil India Private Ltd	2.70	0.03
Total	8,483.47	100.00

Nominee wise Lubricant Sales Values

Nominee	LUBRICANT SALES VALUES - 2020 THIRD QUARTER	
	LKR Million	%
Chevron Lubricants Lanka PLC	3,235.80	38.14
Lanka IOC PLC	1,050.63	12.38
Toyota Lanka (Pvt) Limited	815.82	9.62
Laugfs Lubricants Limited	683.51	8.06
McLarens Lubricants Limited	585.44	6.90
Ceylon Petroleum Corporation	468.63	5.52
United Motors Lanka PLC	396.68	4.68
Associated Motorways Limited	373.87	4.41
TVS Automotives (Pvt)Ltd	339.87	4.01
N. M. Distributors (Pvt) Limited	332.76	3.92
Interocean Lubricants (Private) Limited	176.27	2.08
Spectrum Trading Company Pvt Ltd	21.15	0.25
Nawaloka Petroleum (Pvt) Limited	2.70	0.03
Transmec International	0.34	0.00
Total	8,483.47	100.00

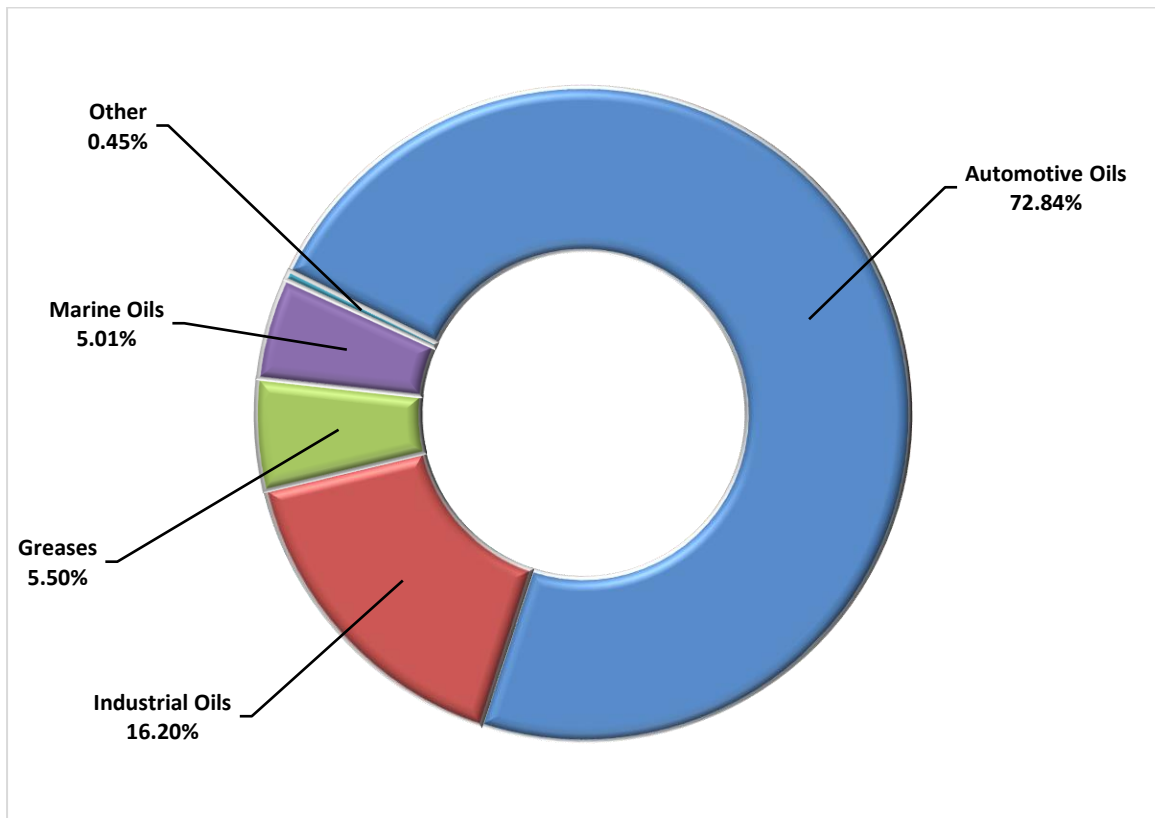
Type of Lubricant wise Lubricant Sales Quantity

Type of Lubricant	LUBRICANT SALES QUANTITY – 2020 THIRD QUARTER	
	kL	%
Automotive Oils	12,463.97	68.75
Industrial Oils	3,913.23	21.59
Marine Oils	1,041.57	5.75
Greases	688.73	3.80
Other	21.05	0.12
Total	18,128.55	100.00



Type of Lubricant wise Lubricant Sales Values

Type of Lubricant	LUBRICANT SALES VALUES - 2020 THIRD QUARTER	
	LKR Million	%
Automotive Oils	6,179.34	72.84
Industrial Oils	1,374.60	16.20
Greases	466.30	5.50
Marine Oils	424.87	5.01
Other	38.35	0.45
Total	8,483.47	100.00

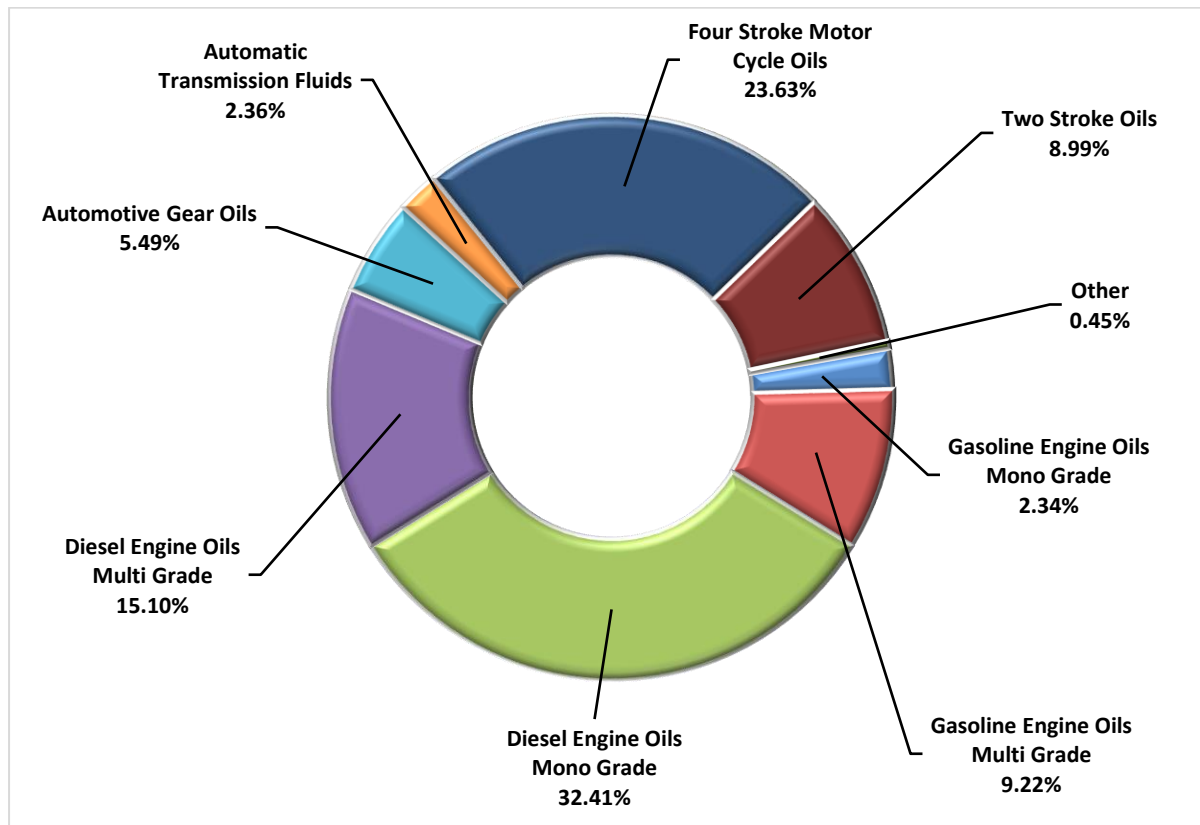


Nominee wise and Type of Lubricant wise Lubricant Sales Quantity

Nominee	LUBRICANT SALES QUANTITY – 2020 THIRD QUARTER (kL)					
	Automotive Oils	Greases	Industrial Oils	Marine Oils	Other	Total
Chevron Lubricants Lanka PLC	5,116.16	334.02	1,496.36	578.37	-	7,524.91
Lanka IOC PLC	2,123.98	35.95	1,242.23	118.80	-	3,520.96
Laugfs Lubricants Limited	1,263.09	86.57	597.53	-	-	1,947.19
Ceylon Petroleum Corporation	1,108.90	18.90	46.90	-	11.10	1,185.80
McLarens Lubricants Limited	442.83	17.40	133.09	263.71	-	857.03
United Motors Lanka PLC	614.70	8.15	30.79	-	-	653.64
Toyota Lanka (Pvt) Limited	613.46	0.52	-	-	9.95	623.93
TVS Automotives (Pvt)Ltd	463.69	29.30	100.77	-	-	593.76
N. M. Distributors (Pvt) Limited	226.25	6.91	164.79	42.08	-	440.03
Associated Motorways Limited	315.00	4.81	42.08	34.41	-	396.30
Interocean Lubricants (Private) Limited	154.04	144.52	58.40	4.20	-	361.16
Spectrum Trading Company Pvt Ltd	19.98	-	-	-	-	19.98
Nawaloka Petroleum (Pvt) Limited	1.56	1.68	0.29	-	-	3.53
Transmec International	0.33	-	-	-	-	0.33
Total	12,463.97	688.73	3,913.23	1,041.57	21.05	18,128.56

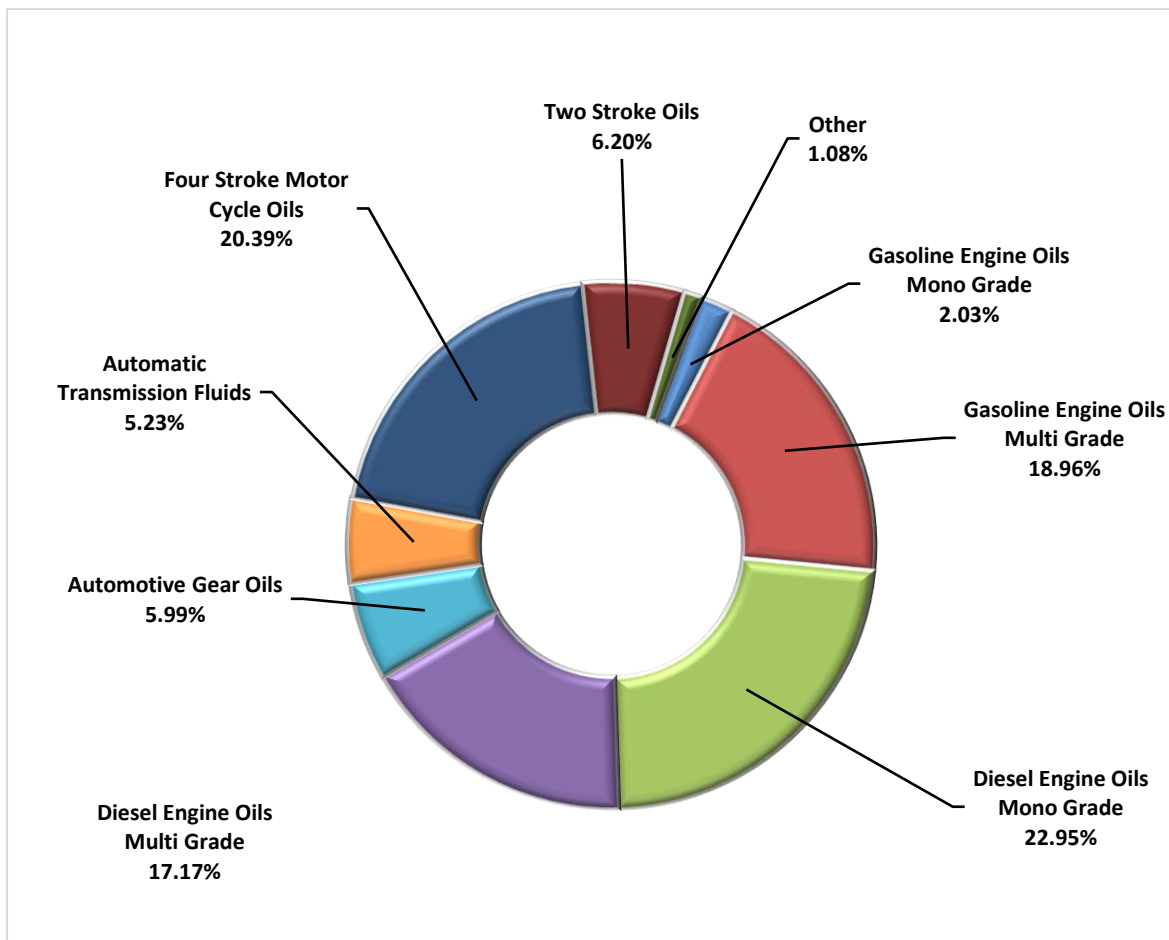
Automotive Lubricant Sales Quantity

Automotive Oil Type	LUBRICANT SALES QUANTITY – 2020 THIRD QUARTER	
	kL	%
Gasoline Engine Oils Mono Grade	291.95	2.34
Gasoline Engine Oils Multi Grade	1,149.72	9.22
Diesel Engine Oils Mono Grade	4,039.64	32.41
Diesel Engine Oils Multi Grade	1,882.24	15.10
Automotive Gear Oils	684.51	5.49
Automatic Transmission Fluids	294.41	2.36
Four Stroke Motor Cycle Oils	2,945.17	23.63
Two Stroke Oils	1,120.05	8.99
Other	55.76	0.45
Total	12,463.43	100.00



Automotive Lubricant Sales Values

Automotive Oil Type	LUBRICANT SALES VALUES - 2020 THIRD QUARTER	
	LKR Million	%
Gasoline Engine Oils Mono Grade	125.34	2.03
Gasoline Engine Oils Multi Grade	1,171.48	18.96
Diesel Engine Oils Mono Grade	1,418.25	22.95
Diesel Engine Oils Multi Grade	1,061.25	17.17
Automotive Gear Oils	370.20	5.99
Automatic Transmission Fluids	323.07	5.23
Four Stroke Motor Cycle Oils	1,259.72	20.39
Two Stroke Oils	383.10	6.20
Other	67.03	1.08
Total	6,179.45	100.00



Nominee wise Automotive Lubricant Sales Quantity

Automotive Oil Type	QUARTERLY LUBRICANT SALES QUANTITY – 2020 THIRD QUARTER (kl)														
	Chevron Lubricants Lanka PLC	Lanka IOC PLC	Laugfs Lubricants Limited	Ceylon Petroleum Corporation	McLarens Lubricants Limited	Toyota Lanka (Pvt) Limited	TVS Automotives (Pvt) Ltd	United Motors Lanka PLC	Associated Motorways Limited	N. M. Distributors (Pvt) Limited	Interocean Lubricants (Private) Limited	Spectrum Trading Company Pvt Ltd	Nawaloka Petroleum (Pvt) Limited	Transmec International	TOTAL
Gasoline Engine Oils Mono Grade	207.40	15.63	59.62	6.30	-	-	3.00	-	-	-	-	-	-	-	291.95
Gasoline Engine Oils Multi Grade	194.44	7.82	27.07	53.60	161.10	474.82	9.00	71.55	95.83	43.05	2.23	8.29	0.83	0.09	1,149.72
Diesel Engine Oils Mono Grade	1,821.75	874.94	490.54	420.80	12.00	9.30	131.00	129.49	21.72	11.21	116.63	-	0.26	-	4,039.64
Diesel Engine Oils Multi Grade	1,003.06	244.60	39.85	11.40	166.50	44.03	26.00	184.55	32.01	119.54	10.05	0.16	0.42	0.07	1,882.24
Automotive Gear Oils	294.67	182.69	68.41	45.20	4.20	13.61	38.00	12.34	4.13	2.63	18.57	-	0.06	-	684.51
Automatic Transmission Fluids	110.91	4.36	13.08	5.40	61.50	71.70	5.00	11.15	2.22	3.20	5.88	-	-	-	294.41
Four Stroke Motor Cycle Oils	1,186.28	652.47	394.21	54.20	36.40	-	243.00	205.61	114.57	46.54	0.69	11.18	-	0.01	2,945.17
Two Stroke Oils	297.65	140.45	169.13	500.90	0.10	-	6.00	-	5.82	-	-	-	-	-	1,120.05
Other	-	1.02	1.18	11.10	0.90	-	2.00	-	38.69	0.06	-	0.35	0.29	0.16	55.76
Total	5,116.16	2,123.98	1,263.09	1,108.90	442.70	613.46	463.00	614.70	314.99	226.23	154.05	19.98	1.86	0.33	12,463.43