



Public Utilities Commission of Sri Lanka
Shadow Regulator of the Lubricant Market

Lubricant Market Report 2019



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As the shadow regulator of the lubricant market, Public Utilities Commission of Sri Lanka, collects and records operational information of the lubricant market. This report summarizes the operational information and provides an overview of lubricant market in Sri Lanka.

Petroleum Industry

The downstream petroleum industry comprises of the importation and refining of crude oil as well as the importation, exportation, distribution, supply and sale of petroleum products such as petrol, diesel, kerosene, furnace oil, liquefied petroleum gas, marine fuel, aviation fuel, naphtha, bitumen as well as other mineral oil products and lubricant oil including greases. It is primarily governed by the Ceylon Petroleum Corporation Act, No. 28 of 1961 as amended and the Petroleum Products (Special Provisions) Act, No. 33 of 2002.

Presently, the Minister in charge of the subject of Petroleum has overall powers to regulate the downstream petroleum industry. However, the operations of market participants are not monitored and regulated properly. In view of the above, a new regulatory framework is to be established under purview of Public Utilities Commission of Sri Lanka. Towards this end, amendments to the Petroleum Products (Special Provisions) Act, No. 33 of 2002 have been prepared by the Ministry of Petroleum Resources Development. The sanction of the Parliament for proposed amendments to the respective acts is currently pending and once those acts are passed by the Parliament, PUCSL will be empowered to fully regulate the downstream petroleum industry.

PUCSL has been designated as the regulator for Petroleum industry. However, the respective acts (The Petroleum Products (Special Provisions) (Amendment) Bill and Ceylon Petroleum Corporation (Amendment) Bill), which would empower the PUCSL to regulate economic, technical, competition and safety aspects of the petroleum industry, is to be presented to the parliament for enactment. At present, the PUCSL assists the Ministry of Petroleum Resources Development to regulate the downstream petroleum products. Petroleum products include petrol, diesel, kerosene, aviation fuel, marine fuel, furnace oil, liquefied petroleum gas and lubricants.

Lubricant Market

In 2006 the government nominated PUCSL as the shadow regulator for the Lubricant Market as an interim measure until PUCSL is fully empowered as the regulator for petroleum industry. Since then PUCSL has been advising and assisting the Ministry of Petroleum in policy matters and regulatory role in lubricant market.

The lubricant market is regulated and governed under the provisions of the Petroleum Products (Special Provisions) Act No. 33 of 2002 and the Ceylon Petroleum Corporation Act No. 28 of 1961. The importation, exportation, blending, production, sale, supply and distribution of lubricants including greases require specific authorization from the Government.

Authorization is granted only to qualified parties who possess proper technical know-how and adequate financial capability, to ensure that substandard products do not enter the market.

As the shadow regulator of the lubricants market, the PUCSL advises the Ministry of Petroleum Resources Development on policy and regulatory matters with respect to liberalization of the lubricants industry. Also PUCSL collect the data related to the lubricant market and publishes periodically.

The PUCSL learnt that there are a number of issues pertaining to quality and price preventing the efficient functioning of the lubricant market affecting the interests of consumers and market participants. Therefore, the Public Utilities Commission of Sri Lanka is currently working out on below listed activities for the beneficiary of the industry.

1. Formulation of a mechanism to eradicate adulterated and authorized lubricants.
2. Formulating Consumer Awareness Campaign on Lubricants
3. Reviewing and updating Sri Lanka Standards for Lubricants
4. Formulating a Mechanism for Testing the Quality of Lubricants
5. Formulating a Procedure for Compulsory Import Inspection of Lubricants by the Sri Lanka Standards Institute and Sri Lanka Customs
6. Formulating a Mechanism for Collection, Recycling and Disposal of Used Lubricants
7. Formulating an Advice on Duty Differential of Imported and Locally Blended Lubricants for Increased Competition

Activities in 2019

Activities of 2019 were based on the outcomes came from the Public Consultation on the Lubricant Market 2019. Issues identified and Proposed Remedies are listed below table 01

Issues	Proposed Remedies	Proposed Regulatory Interventions
<p><u>Quality</u></p> <ul style="list-style-type: none"> • Sale of substandard lubricants – lubricants adulterated with used lubricants. <p><u>Competition & Price</u></p> <ul style="list-style-type: none"> • Barriers to entry – infrequent selection and authorization of new market participants. • Barriers to competition - duty differential between imported and locally blended lubricants. 	<ul style="list-style-type: none"> • Regulate collection and disposal/ recycling of used lubricants. • Process requests for qualification as and when they are received. • Rationalize duties imposed on importation of lubricants, base oils and additives so as to promote fair competition. 	<ul style="list-style-type: none"> • Draft procedure for collection and disposal of used lubricants. • Draft procedure for recycling of used lubricants. • Formulate mechanism for testing the quality of lubricants. • Review and update Sri Lanka Standards for lubricants. • Draft procedure for compulsory import inspection of lubricants by the Sri Lanka Standards Institute and Sri Lanka Customs • Appoint standing technical evaluation and procurement committees. • In the interim, ascertain current duty differential and maintain same at ten percent, as decided by the Cabinet • Conduct independent and in-depth study of local value addition and ascertain optimal duty differential to promote fair competition.
<p><u>Other</u></p> <ul style="list-style-type: none"> • Unauthorized brands of lubricants and unauthorized activities in the market. 	<ul style="list-style-type: none"> • Regulate importation of lubricants by the Import & Export Control Department and Sri Lanka Customs. • Regulate unauthorized activities in the market 	<ul style="list-style-type: none"> • Formulate guidelines for Import & Export Control Department on issuing Import Licenses and guidelines for Sri Lanka Customs on clearing of lubricants. • Formulate a mechanism for investigation and prosecution of unauthorized activities.

• Lack of a consumer complaint handling procedure and responsible agency.	• Refer complaints to the Public Utilities Commission of Sri Lanka for review and recommendation to the Ministry of Petroleum Resources Development for action by the Minister of Petroleum Resources Development.	• Formulate procedure for submission and review of consumer complaints and mechanism for action by relevant Government agencies.
• Lack of consumer awareness regarding correct selection, authorized and substandard lubricants.	• Educate customers through a sustained awareness campaign	• Formulate an awareness campaign

After reviewing the comments of the Public Consultation, the following activities were initiated in 2019;

	Reference	Activity – 2019	Output
01	AP19/ CP/ LIC /07	Preparation of a solution for collection, recycling and disposal of used lubricants	Identification of a proper solution for collection, recycling and disposal of used lubricants
02	AP19/ RU/ LIC /21	Lubricant (Awareness programs/workshop/Market report)	Quality, Price
03	AP19/ RU/ LIC /22	Evaluation and Granting License for New Lubricant Market Players (3rd round)	Granting license for new lubricant market players
04	AP19/ CP/ REA/02	Review and update Sri Lanka Standards for lubricants	Updated and new Sri Lanka Standards for lubricants
05	AP19/ CP/ REA/05	Formulate procedure for compulsory import inspection of lubricants by the Sri Lanka Standards Institute and Sri Lanka Customs	Implementation of a procedure for compulsory import inspection of lubricants by the Sri Lanka Standards Institute and Sri Lanka Customs
06	AP19/ CP/ REA/07	Formulate advise to the government on duty differential of imported and locally blended Lubricants for increased competition	Duty differential of imported and locally blended lubricants is maintained at 10 per cent

Authorized Parties/Brands

Presently there are eleven (11) parties (Company/Nominee) authorized to import, export, sell, supply or distribute lubricants (Activity 2) and three (3) parties are authorized to import, export, blend, produce, sell, supply or distribute specific brand(s) of lubricants (Activity 1) - as indicated below.

Table 1 : List of Authorized Brands, Parties and Activities.

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

1. Market Growth and Market Share

During the year 2019, a total of 62,481.46 Kiloliters of lubricants valued at LKR 28.37 billion were sold, which is 1,786 Kiloliters less than the quantity of lubricants sold in year 2018.

Table 2 : Lubricant Sales Quantity & Revenue - 2009 to 2019.

Year	Lubricants - Total Sales		Annual Increase (%)	
	Quantity (kL)	Revenue (LKR Mil.)	Quantity	Revenue
2019	62,481	28,369	(2.78)	3.78
2018	64,267	27,336	(0.34)	3.07
2017	64,485	26,522	(0.15)	1.57
2016	64,585	26,112	11.4	11.3
2015	57,978	23,463	6.8	3.6
2014	54,265	22,640	1.0	11.0
2013	53,708	20,397	(4.7)	(2.2)
2012	56,334	20,854	(3.8)	11.1
2011	58,554	18,775	7.7	33.8
2010	54,369	14,035	21.0	27.1
2009	44,945	11,039		

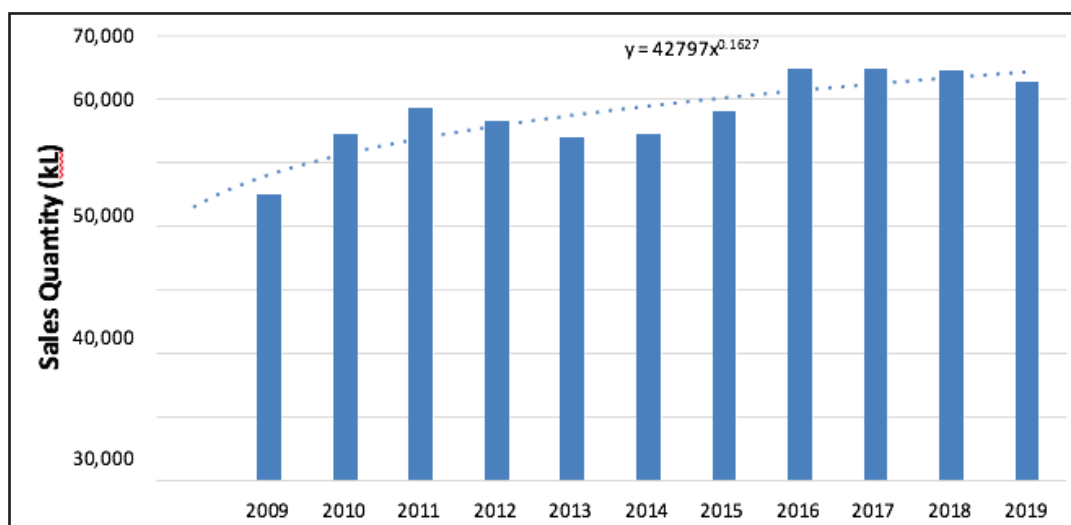


Figure 1 : Lubricant Sales Quantity - 2009 to 2019

According to table 3, market leader held a share of 41.36 % in 2019 (37.32 % in 2018) with nearest competitor seized 12.56 % of market share in the same year dropped from 17.61 % in 2018.

Table 3 : Lubricant Sales & Market Share - 2017 to 2019

Company	SALES QUANTITIES					
	2019		2018		2017	
	kL	%	kL	%	kL	%
Chevron Ceylon Limited	25,842.62	41.36	23,987.00	37.32	25,721.00	39.89
Indian Oil Corporation Limited	7,848.61	12.56	11,316.17	17.61	10,969.60	17.01
Laugfs Holdings Limited	6,309.86	10.10	5,775.00	8.99	4,949.56	7.68
ExxonMobil Asia Pacific Pte. Limited	5,683.75	9.10	4,959.08	7.72	3,534.70	5.48
Bharat Petroleum Corporation Limited	4,045.00	6.47	3,584.00	5.58	3,452.00	5.35
Ceylon Petroleum Corporation	3,542.42	5.67	4,071.49	6.34	5,411.60	8.39
Toyota Tsusho Corporation	2,421.63	3.88	2,398.13	3.73	2,110.00	3.27
Shell Markets (Middle East) Limited	1,856.72	2.97	2,330.68	3.63	1,898.34	2.94
Valvoline LLC	1,686.69	2.70	1,525.48	2.37	1,949.84	3.02
Lubricant Company Sinopec Corporation	1,565.60	2.51	1,975.00	3.07	1,986.00	3.08
BP Middle East LLC	1,322.01	2.12	1,496.20	2.33	1,639.54	2.54
Total Oil India Private Limited	264.75	0.42	720.866	1.12	720.89	1.12
Motul	91.80	0.15	127.578	0.2	141.91	0.22
Total	62,481.46	100	64,266.67	100	64,484.98	100

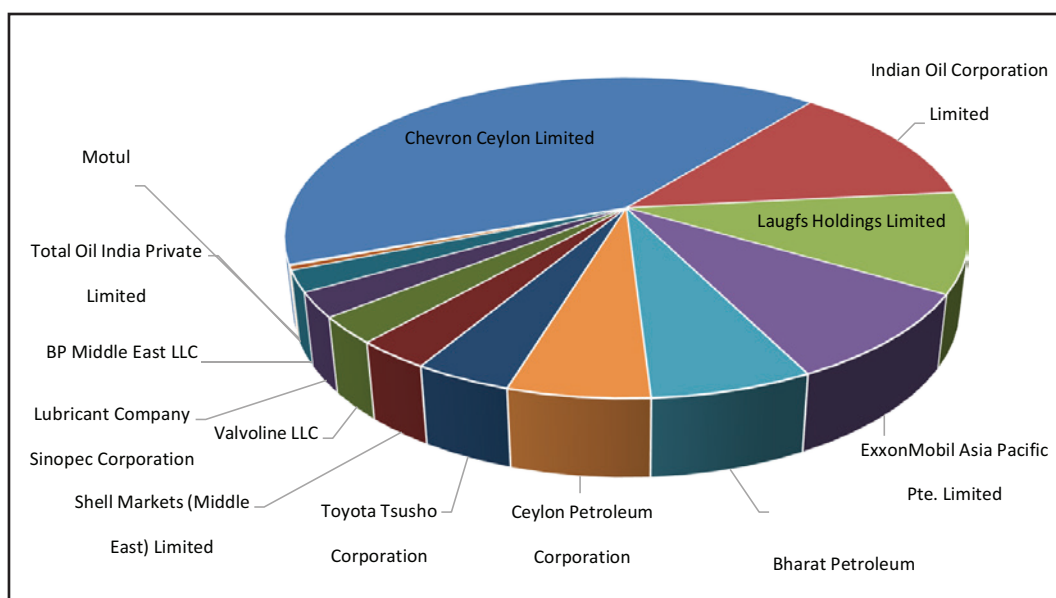


Figure 2 : Lubricant Sales Quantity - 2019

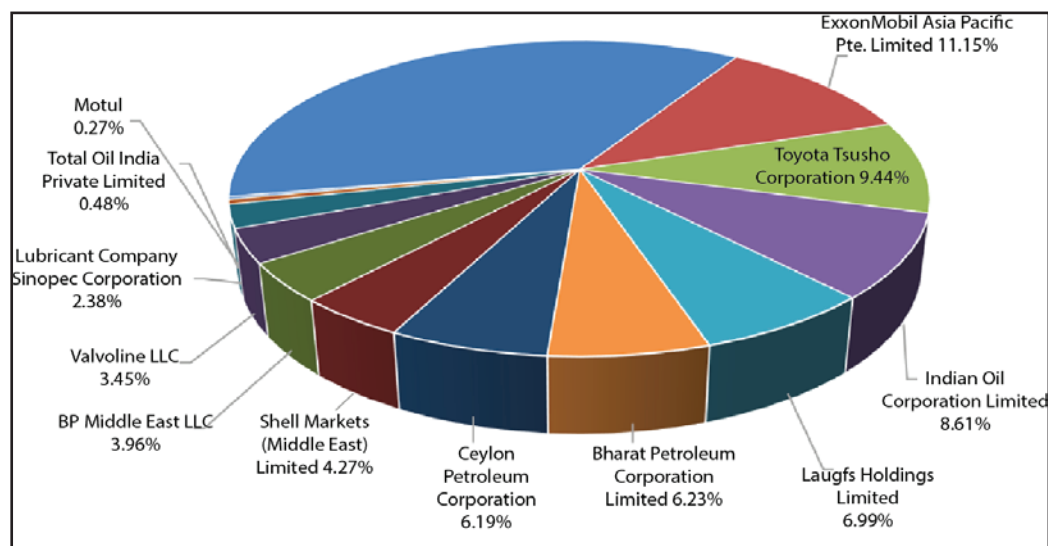


Figure 3 : Lubricant Sales Revenue - 2019

2. Lubricant Sales

Table 4 : Lubricant Sales by Company - 2011 to 2019

Company	Lubricant Sales Quantity (kL)								
	2011	2012	2013	2014	2015	2016	2017	2018	2019
Chevron Ceylon Limited	33,297.42	31,028.90	28,240.58	26,752.97	27,585.20	29,251.30	25,721.00	23,987.00	25,842.62
Indian Oil Corporation Limited	6,565.92	6,230.91	6,738.02	6,832.69	8,618.00	10,590.26	10,969.60	11,316.17	7,848.61
Laugfs Holdings Limited	2,620.43	1,910.47	1,798.00	2,896.76	2,858.29	3,419.59	4,949.56	5,775.00	6,309.86
ExxonMobil Asia Pacific Pte. Limited	4,065.34	4,302.50	3,120.15	3,680.42	2,857.62	3,105.96	3,534.70	4,959.08	5,683.75
Ceylon Petroleum Corporation	4,915.50	5,589.95	6,452.68	5,718.70	5,325.85	5,445.90	5,411.60	4,071.49	3,542.42
Bharat Petroleum Corporation Limited	1,771.00	1,565.46	1,759.79	2,241.17	2,951.40	3,710.27	3,452.00	3,584.00	4,045.00
Toyota Tsusho Corporation	542.58	729	798	1,027.39	1,483.16	1,911.99	2,110.00	2,398.13	2,421.63
Shell Markets (Middle East) Limited	1,183.12	1,183.12	1,160.74	1,183.12	1,412.93	1,290.11	1,898.34	2,330.68	1,856.72
Lubricant Company Sinopec Corporation	1,784.89	1,565.80	1,221.19	1,207.70	1,527.20	1,569.20	1,986.00	1,975.00	1,565.60
Valvoline LLC	663.53	710.79	784.76	1,076.61	1,300.16	1,869.49	1,949.84	1,525.48	1,686.69
BP Middle East LLC	54.34	20.55	1,475.52	1,314.44	1,519.11	1,693.26	1,639.54	1,496.20	1,322.01
Total Oil India Private Limited	144.28	160.86	112.2	286.9	479.26	593.12	720.89	720.87	264.75
Motul	21.05	56.21	46.08	46.08	59.93	134.88	141.91	127.58	91.80
Total	57,629.40	55,054.52	53,707.71	54,264.95	57,978.11	64,585.33	64,484.98	64,266.67	62,481.46

Table 5 : Lubricant Sales by Type of Lubricant - 2011 to 2019

Type	Lubricant Sales Quantity (kl)									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Automotive	38,024.30	39,963.51	37,389.75	37,418.58	38,942.46	42,858.17	46,607.04	46,804.41	47,251.80	44,950.47
Industrial	8,700.00	9,648.68	10,418.57	11,361.83	9,956.82	10,724.53	11,625.05	10,624.04	10,404.29	10,801.47
Marine	3,656.00	3,723.61	3,316.90	2,546.41	2,870.92	1,786.63	3,417.49	4,159.89	3,810.89	4,218.67
Greases	2,295.50	2,545.86	2,459.13	2,380.90	2,491.37	2,608.79	2,810.94	2,645.27	2,619.29	2,359.49
Other	1,693.00	1,726.69	1,470.16	-	3.38	-	124.80	252.37	180.38	151.36
Total	54,368.80	57,608.35	55,054.51	53,707.71	54,264.95	57,978.13	64,585.33	64,484.98	64,266.67	62,481.46

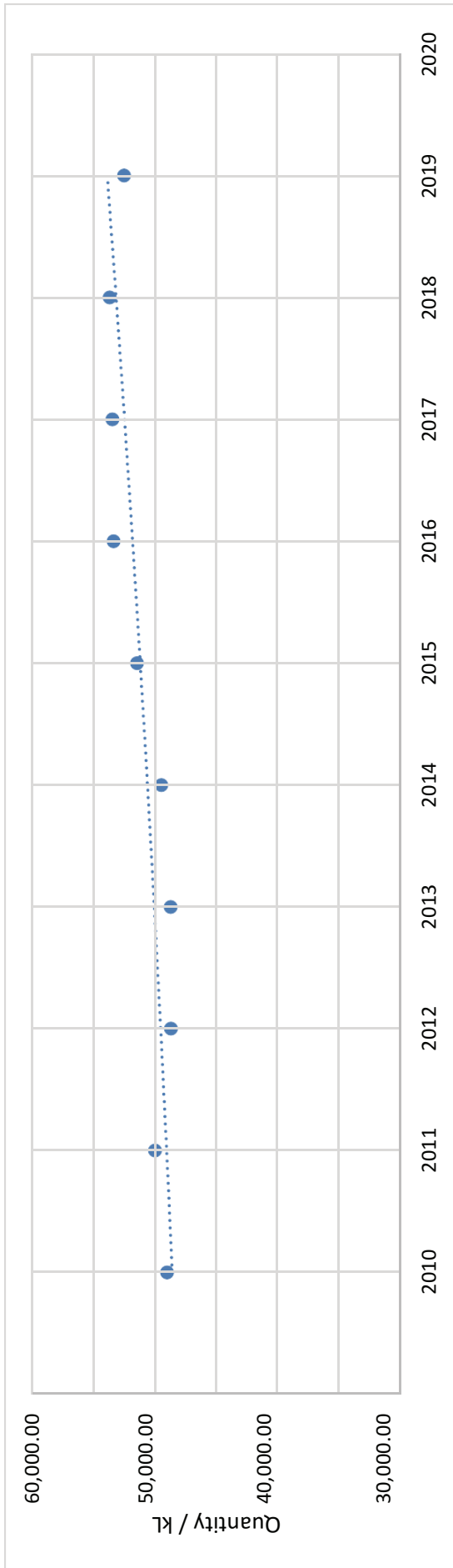


Figure 4 : Automotive Lubricant Automotive Sales

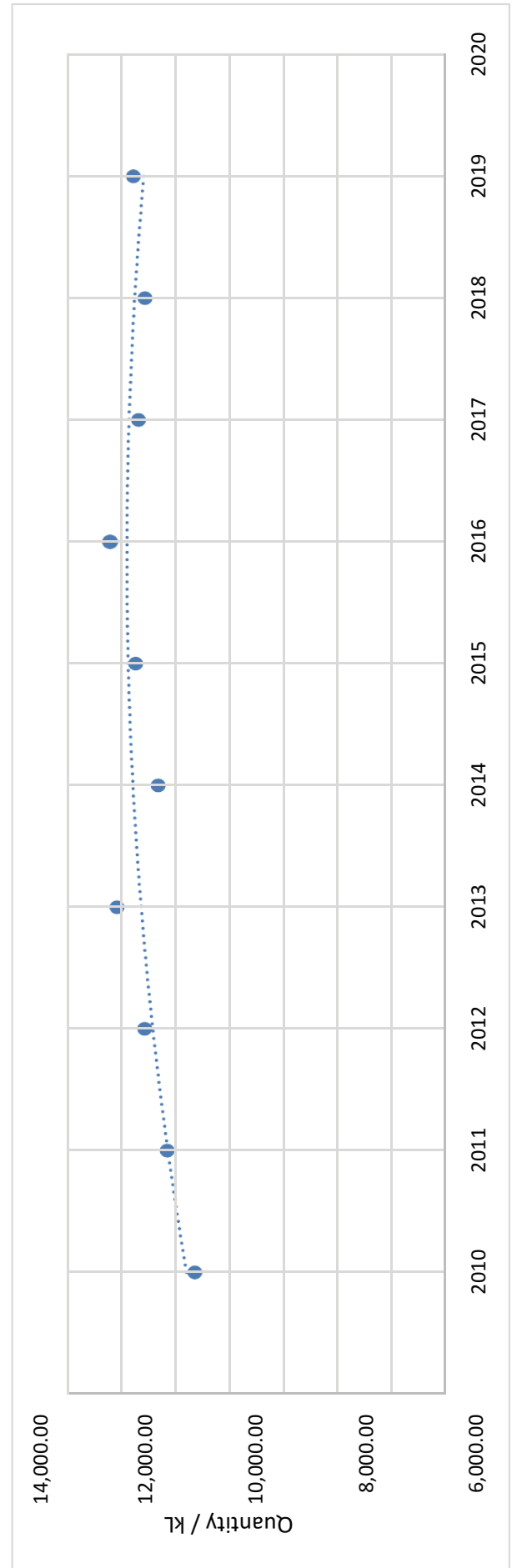


Figure 5 : Industrial Lubricant Sales

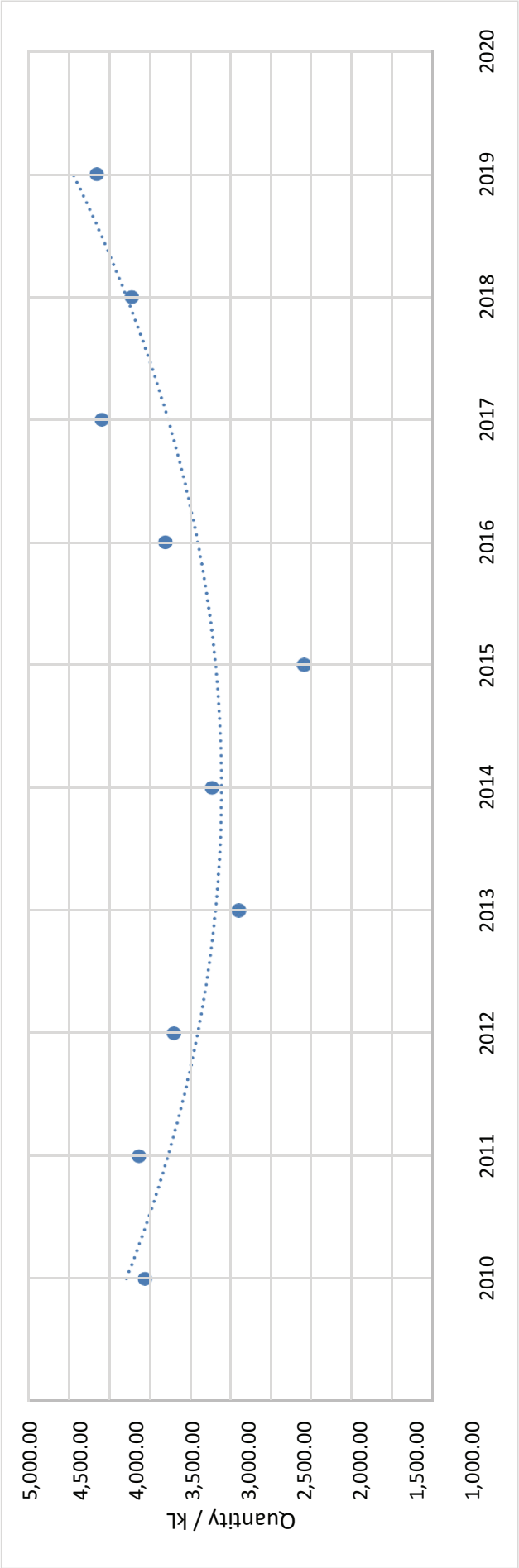


Figure 6 : Marine Lubricant Sales

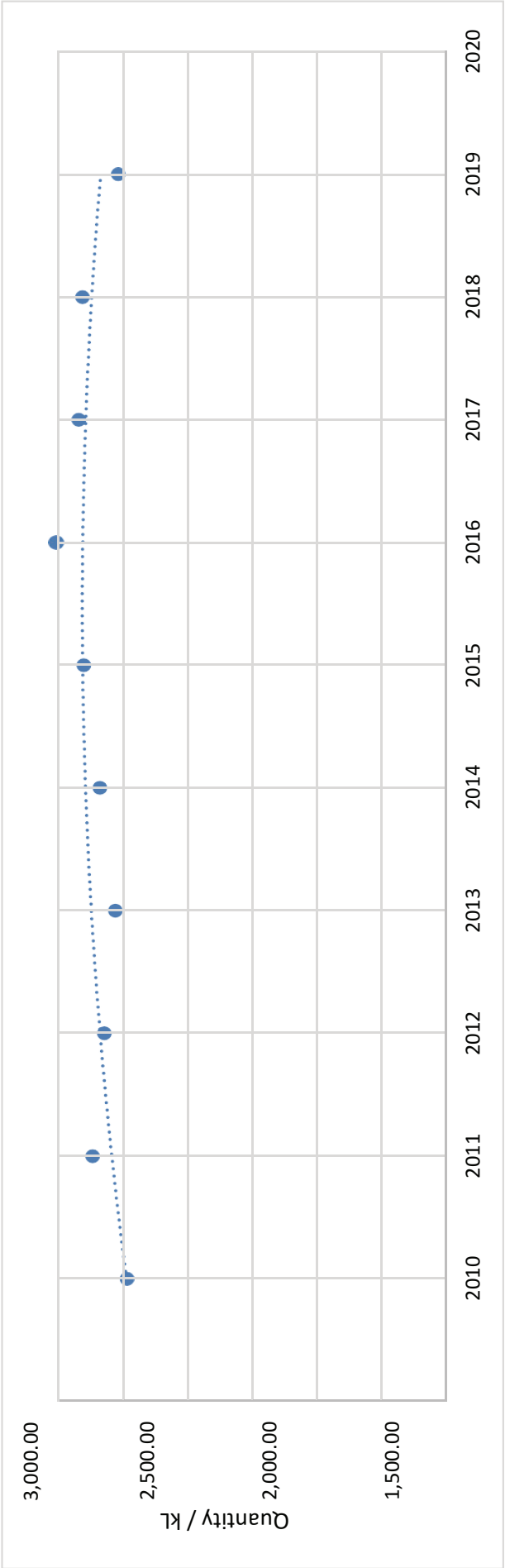


Figure 7 : Greases Sales

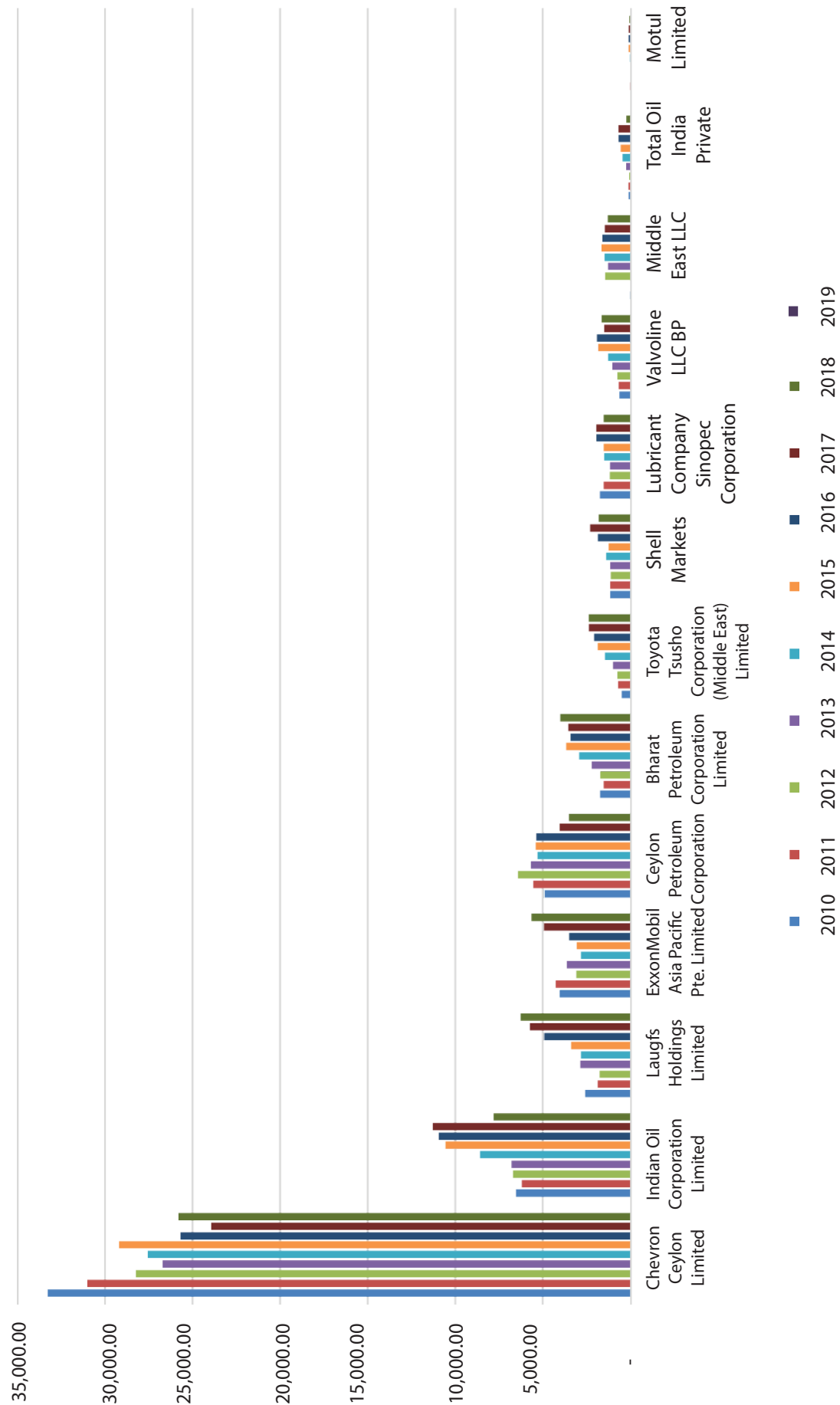


Figure 8 : Lubricant Sales Quantity by Company - 2011 to 2019

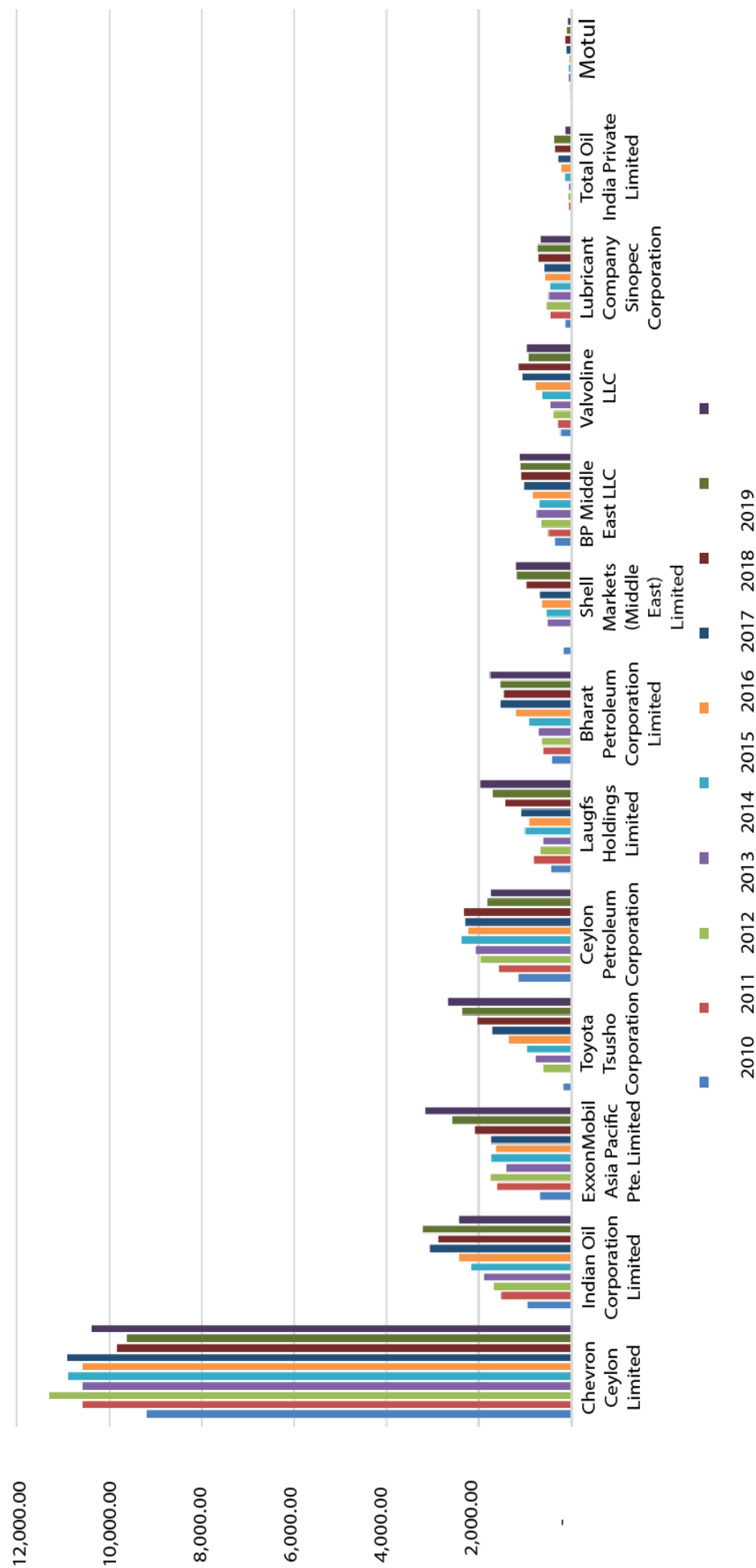


Figure 9 : Lubricant Sales Revenue by Company - 2010 to 2019

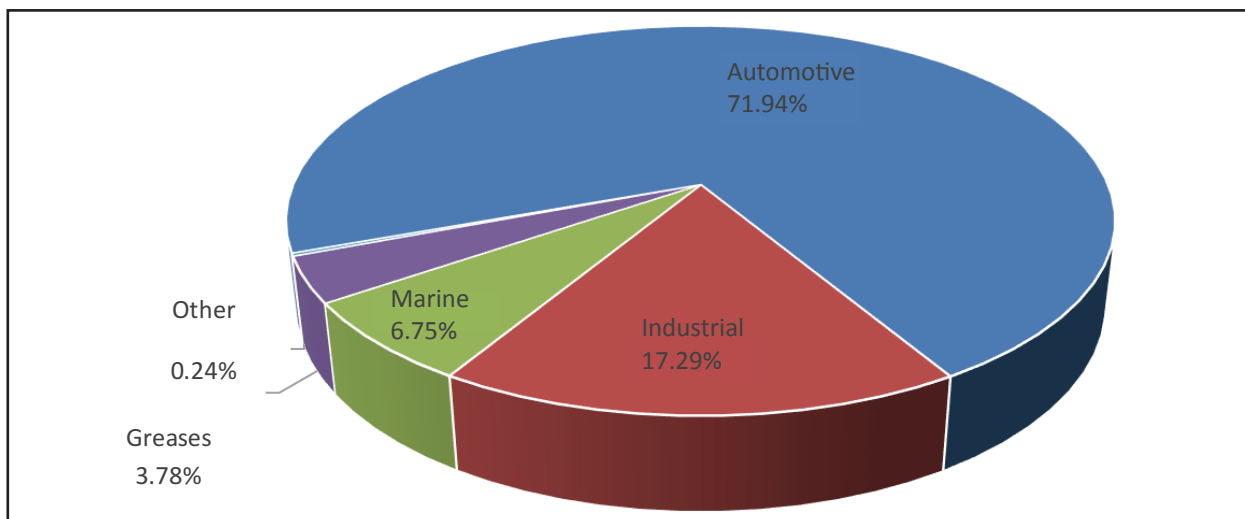


Figure 10 : Lubricant Sales Quantity by Type of Lubricant - 2019

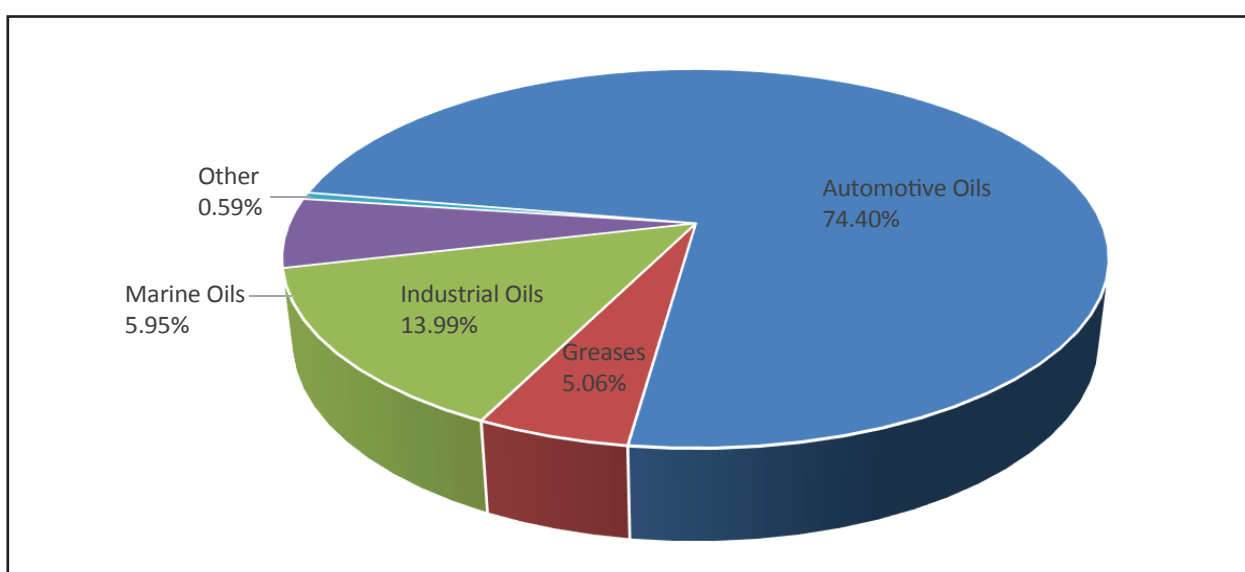


Figure 11 : Lubricant Sales Revenue by Type of Lubricant - 2019

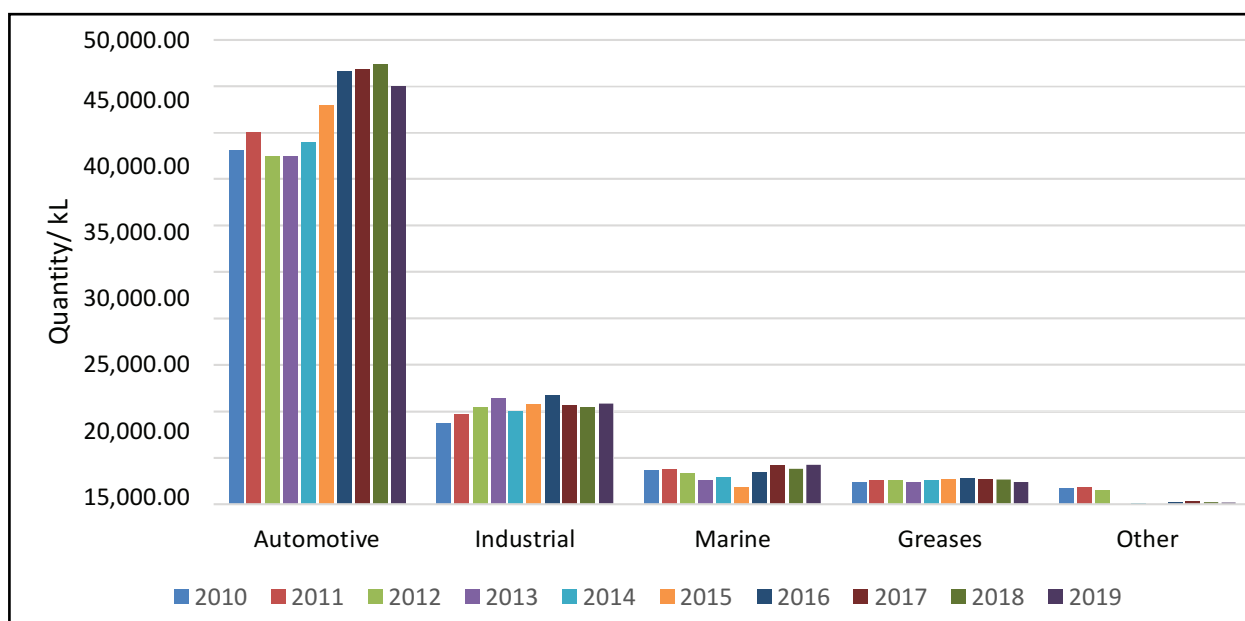


Figure 12 : Lubricant Sales Quantity by Type of Lubricant - 2010 to 2019

5 Automotive Lubricant Sales

Table 6 : Automotive Lubricant Sales by Type of Lubricant - 2019

Type of Automotive Lubricant	Quantity (kL)
Gasoline Engine Oils -Multi Grade	4,607.71
Gasoline Engine Oils-Mono Grade	1,026.17
Diesel Engine Oils-Multi Grade	7,112.91
Diesel Engine Oils - Mono Grade	14,519.46
Four Stroke Motor Cycle Oils	10,458.57
Two Stroke Oils	4,036.16
Automotive Gear Oils	2,119.14
Automatic Transmission Fluids	881.79
Other	189.05
Total	44,950.95

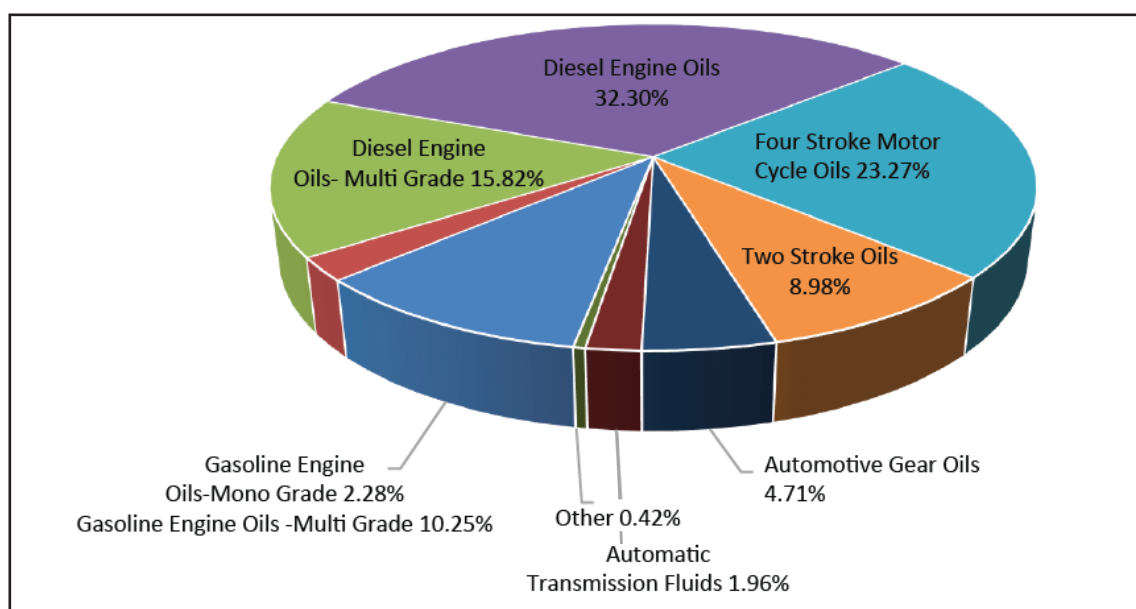


Figure 13: Automotive Lubricant Sales Quantity by Type of Lubricant - 2019

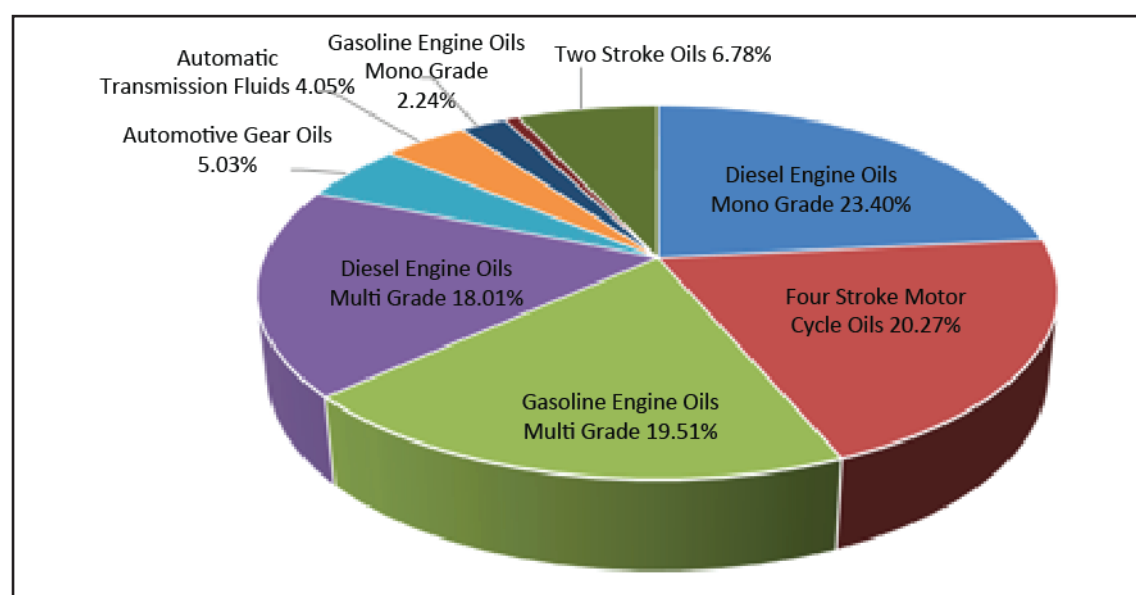


Figure 14: Automotive Lubricant Sales Revenue by Type of Lubricant - 2019

6 Synthetic Lubricant Sales

Table 7: Synthetic Lubricant Sales Quantity by Type of Lubricant - 2019

Lubricant (Synthetic)	Amount (kL)
Automotive Oils	612.51
Industrial Oils	95.16
Marine Oils	0.37
Greases	1.56
Other	0.10
Total	709.70

Table 8 : Synthetic Lubricant Sales Quantity by Company - 2019

Company	Lubricant Sales (Synthetic) - kL
Chevron Ceylon Limited	226.35
ExxonMobil Asia Pacific Pte. Limited	179.65
BP Middle East LLC	123.05
Valvoline LLC	82.87
Motul	21.14
Laugfs Holdings Limited	58.38
Shell Markets (Middle East) Limited	14.06
Toyota Tsusho Corporation	3.13
Total Oil India Private Limited	1.04
Indian Oil Corporation Limited	0.02
Total	709.70

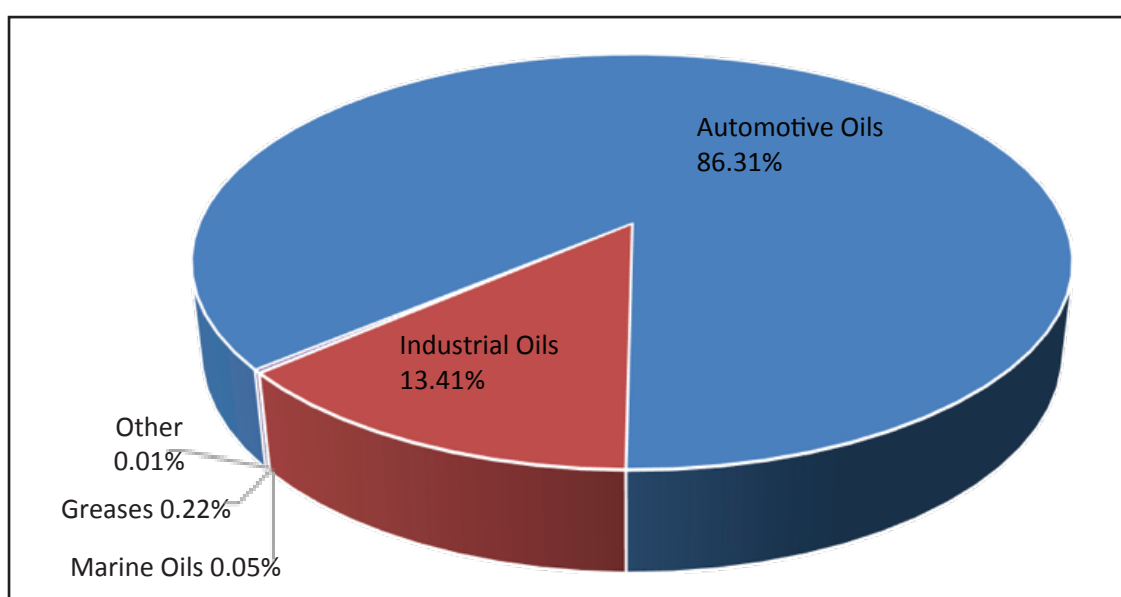


Figure 15 : Synthetic Lubricant Sales Quantity by Type of Lubricant - 2019

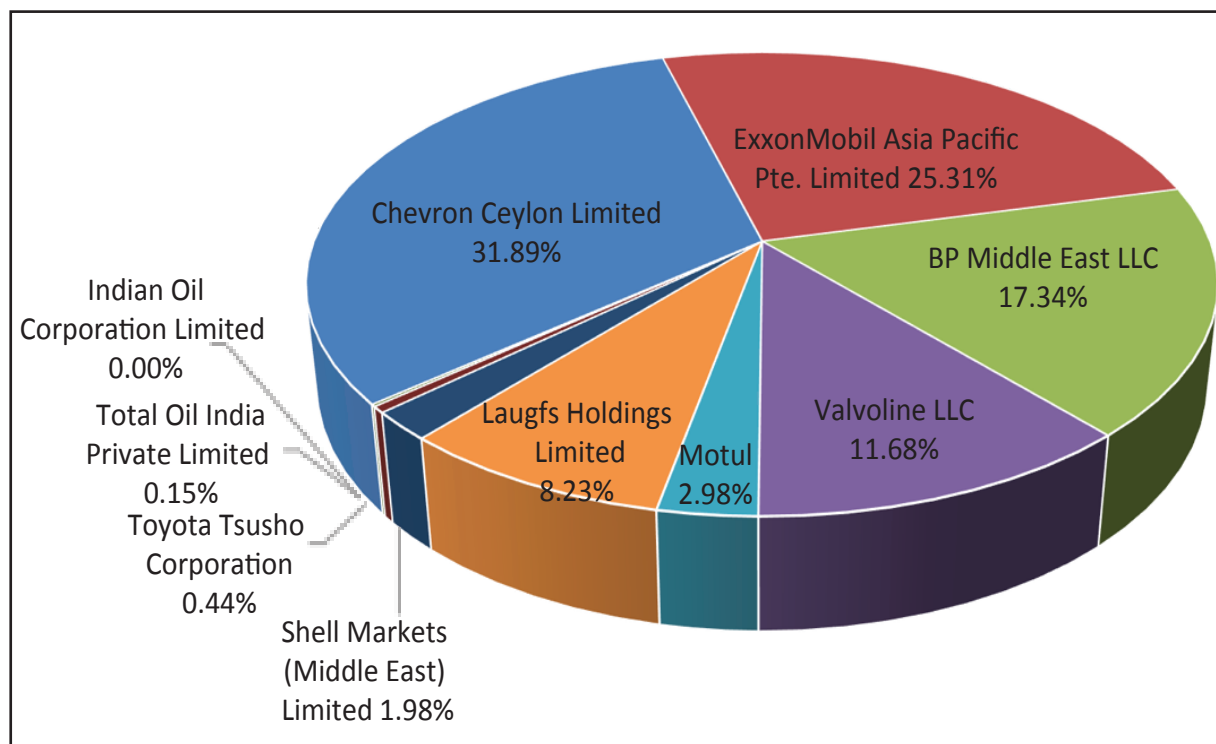


Figure 16 : Synthetic Lubricant Sales Quantity by Company - 2019

7 Lubricant Imports

During the year 2019, a total of 24,304.48 Kiloliters of lubricants were imported - lubricant type wise breakdown is listed below.

Table 9 : Lubricant Imports Quantity - 2019

Lubricant	Amount (kL)
Automotive Oils	17,099.82
Industrial Oils	3,207.33
Marine Oils	1,724.10
Greases	2,219.05
Other	54.19
Total	24,304.48

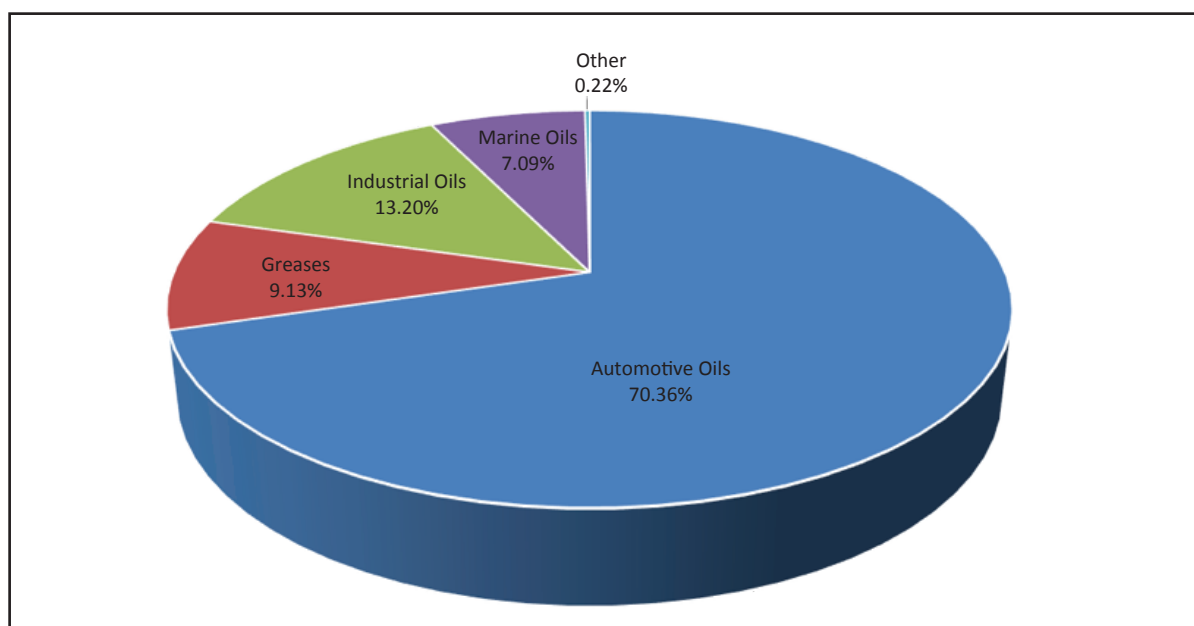


Figure 17 : Lubricant imports quantity by type - 2019

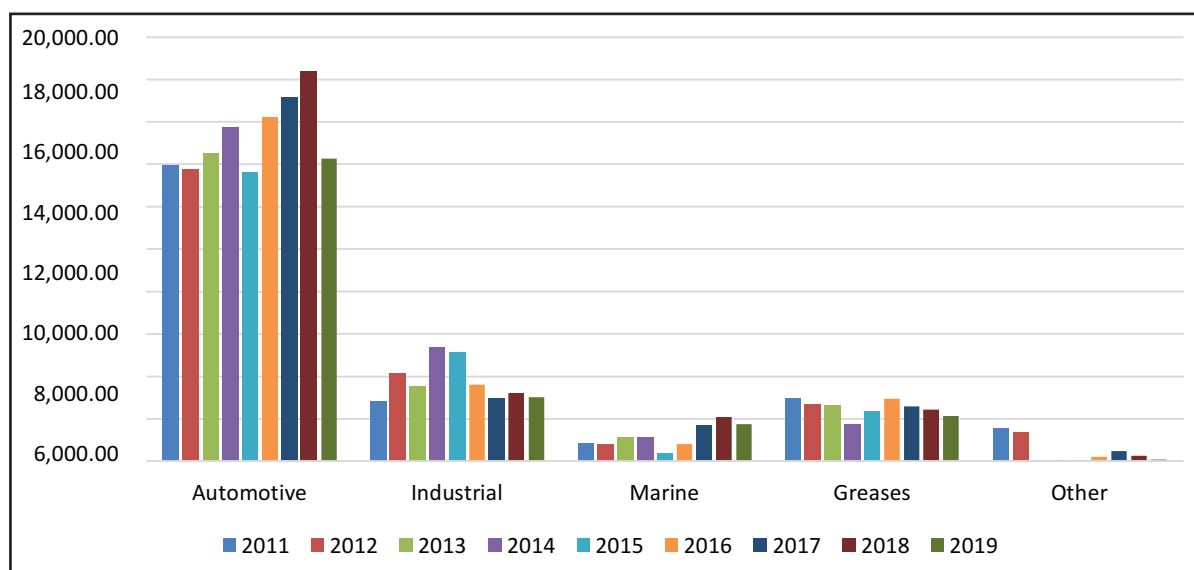


Figure 18: Lubricant imports quantity by type - 2011 to 2019

The total quantity of base oil and additives imported is given below

Table 10: Total Base Oil and Additive Imports - 2019

Company	Base Oils/kL	Additives/kL
Chevron Ceylon Limited	17,988.00	3,270.53
Indian Oil Corporation Limited	1,709.75	532.43
Laugfs Holdings Limited	5,669.21	365.43
Total	25,366.96	4,168.39

8 Lubricant Exports

During the year 2019, a total of 4,273.50 Kiloliters of lubricants were exported to regional markets - lubricant type-wise and company-wise export quantities are given below.

Table 11: Lubricant Exports Quantity - 2019

Lubricant	Amount (kL)
Automotive Oils	2,945.24
Industrial Oils	339.05
Marine Oils	972.65
Greases	16.55
Total	4,273.50

Table 12 :Lubricant Exports Quantity by Company - 2019

Company	Amount (kL)
Chevron Ceylon Limited	3,799.95
Indian Oil Corporation Limited	217.65
ExxonMobil Asia Pacific Pte. Limited	150.97
Shell Markets (Middle East) Limited	104.93
Total	4,273.50

9 Lubricant Production

During the year 2019, a total of 42,784.14 Kiloliters of lubricants were produced (blended) in Sri Lanka, out of which 66.96%, 18.66% and 14.38% was produced by Chevron Ceylon Limited, Indian Oil Corporation Limited and Laugfs Holdings Limited respectively.

Table 13 : Lubricant Production

Lubricant	Amount (kL)
Automotive Oils	30,995.39
Industrial Oils	9,039.15
Marine Oils	2,715.50
Greases	34.10
Total	42,784.14

10 Lubricant Standards

The following are the minimum standards which apply to lubricants and greases imported, exported, sold, supplied or distributed in Sri Lanka. These standards comprise of Sri Lanka Standards formulated by the Sri Lanka Standards Institution in terms of the Sri Lanka Standards Institution Act, No. 6 of 1984.

Table 14 : Lubricant Standards

Type of Lubricant	Minimum Standard	Equivalent International Standard	Higher Standards (Above Minimum Standards)
Gasoline Engine Oil	SLS 1374/2009	API SJ	API SL, API SM
Diesel Engine Oil	SLS 1373/2009	API CF	API CF-2, API CG-4, API CH-4, API CL-4, API CJ-4
Two Stroke Engine Oil	SLS 1446/2012	JASO FC	JASO FD
Four Stroke Motorcycle Engine Oil	SLS 1409/2011	API SG and JASO MA	API SL and JASO MA, API SM and JASO MA, API SL and JASO MA
Automotive Gear Oil	SLS 1396/2010	API GL 4	API GL 5, API GL 6
Automatic Transmission Oil	DEXRON IID, DEXRON III MERCON, ALLISON C4, JASO M315 Type Group A	DEXRON IID, DEXRON III MERCON, ALLISON C4, JASO M315 Type Group A	OEM Recommended Oils
Grease	SLS 1424/2011	NLGI LA	NLGI LB, NLGI GA, NLGI GB, NLGI GC

11 Government Revenue

The market participants pay to the Government bi-annually a fixed and a variable registration fee equivalent to a sum of Rs. 2.5 million or 0.75% of Total Invoiced Sales for that period, whichever is higher. In making the said bi-annual payment, a sum of Rs. 2.5 million is paid on or before the 1st January and another sum of Rs. 2.5 million is paid on or before 1st July of each year, and in the event of 0.75% of Total Invoiced Sales for that period being greater than the Rs. 2.5 million, such additional amount is paid within 30 days of the end of that period. In 2019 the total recognized revenue to the Government is approximately LKR 222 million.

12 Market Analysis

The total reported volume of lubricants sold during 2019 is 62,481 kL, which is 1,786 kL less than that of 2018. However, the total value of lubricants sold during 2019 is 28.37 LKR billion, which is 1.03 LKR billion higher than that of 2018. Accordingly, during 2019, the lubricant market has recorded a negative growth in terms of sales volume of 2.78 % when compared against that of 2018. Further, a trend of negative growth of total lubricant sales volume can be observed during years 2017, 2018 and 2019 in the market.

During 2019, the volume of both automotive lubricants and greases sold has decreased by 4.87 % and 9.92% while the volume of both industrial lubricants and marine lubricants sold has increased by 3.82% and 10.70% respectively compared against the sales of such products reported during 2018. The total reported volume of automotive lubricants sold during 2019 is 44,950.47 kL, which is 2301.33 kL less than that of 2018. The lower volume of automotive lubricants sold has significantly contributed to the overall negative growth in the reported volume of lubricants sold during 2019. Therefore, the trend of positive growth of automotive lubricant sales volume observed since 2015 has changed during 2019.

Further, during the year 2019, the volume of diesel engine oil (mono grade) sold has significantly reduced by nearly 10% (1,500 kL) compared against that of 2018, while the volume of diesel engine oil (multi grade), four stroke motor cycle oil, two stroke motor cycle oil, automotive gear oil and automatic transmission fluid has slightly decreased compared against 2018. The volume of diesel engine oil (mono grade) sold during the last three years has decreased, while the volume of gasoline engine oil (multi grade) sold has increased during the same period (see table below).

Type of Automotive Lubricant	2017	2018	2019
Gasoline Engine Oil - Multi Grade	4,100.41	4,327.30	4,607.71
Gasoline Engine Oil - Mono Grade	1,085.26	1,012.64	1,026.17
Diesel Engine Oil - Multi Grade	7,024.12	7,282.35	7,112.91
Diesel Engine Oil - Mono Grade	16,859.14	16,019.69	14,519.46
Four Stroke Motorcycle Engine Oil	10,106.98	10,616.29	10,458.57
Two Stroke Motorcycle Engine Oil	4,271.36	4,432.44	4,036.16
Automotive Gear Oil	2,361.66	2,261.45	2,119.14
Automatic Transmission Oil	889.73	891.39	881.79

During 2019, as per data published by the Ministry of Transport Services Management, the total vehicle population has grown by 4.6% with the registration of 367,303 new vehicles. However, irrespective of the growth of the total vehicle population, the volume of automotive lubricants sold has decreased by 2301.33 kL during 2019.