

Zinc Dialkyl Dithiophosphate (ZDDP)

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Key metrics



Product	Non captive volume, KTA	Total volume, KTA
ZDDP	10	10
PENTANOL	0	3
ISOBUTANOL	0	4
PHOSPHORUS PENTASULFIDE	0	4
ZINC OXIDE	0	2
Total volume	10	23

Location

Jubail

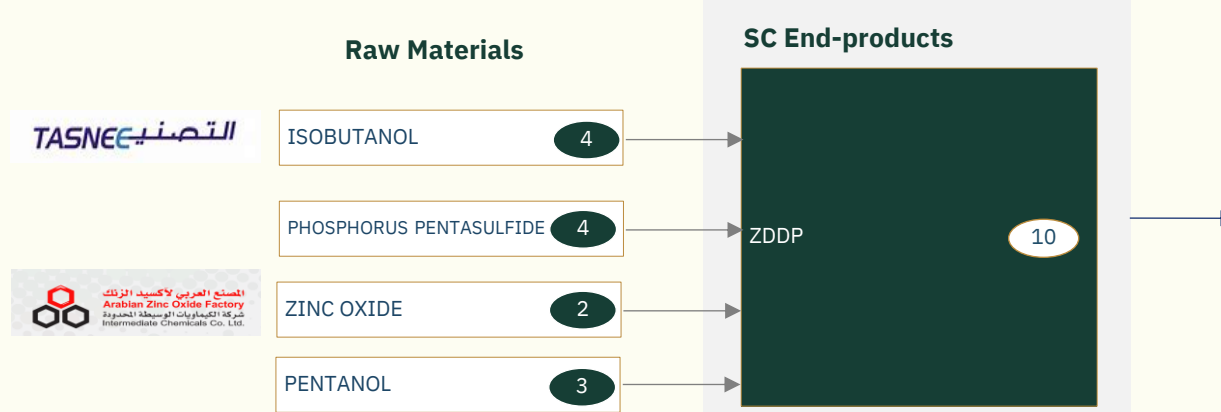
Full potential market growth

~3.6% in KSA and ~2% in Middle East, CAGR '22-30, driven by overall GDP and industrial activities growth in the region

Value chain



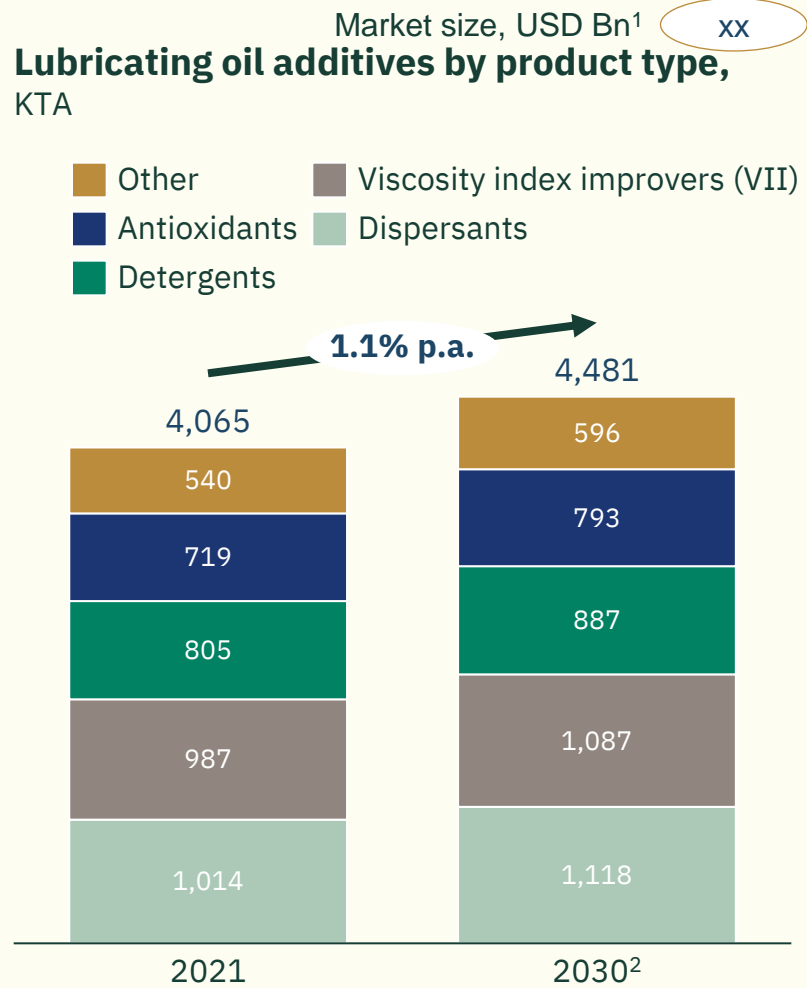
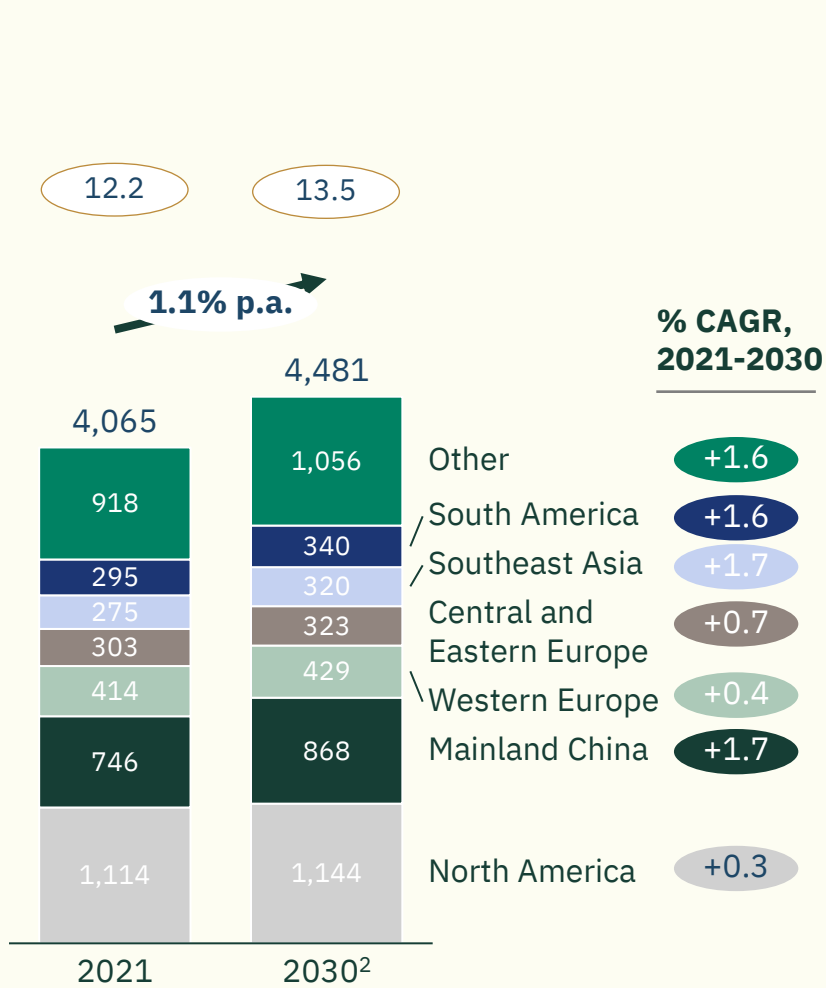
Integrated case
x Raw Materials
 xxx end products
 → Sold to market
 xx Captive capacity
 xx Non-captive capacity



Exemplary players



A. Lubricating oil additives market is set to grow at 1.1% p.a., with dispersants capturing ~25% of total market



Key Insights

- **Global demand growth for lubricating oil additives is mainly driven by Asia pacific market** with CAGRs of 4.1% for India, and 1.7% for Mainland China and Southeast Asia
- **The decrease in vehicle production is slowing down the growth** of the lubricating oil additives market, given that 70% of the market is consumed in auto vehicle lubricants
- **North America is the largest consumer** of lubricant oil additives with **26% share of total global demand**

1. Assumed at current market prices
 2. Based on region CAGR 2021-2026 assumption, extrapolated to 2030

B. Lubricating oil additives market in KSA is estimated at ~54 KTA with a CAGR of 3.6% p.a.

Others Antioxidants VI Improvers Antiwear Detergents Dispersants

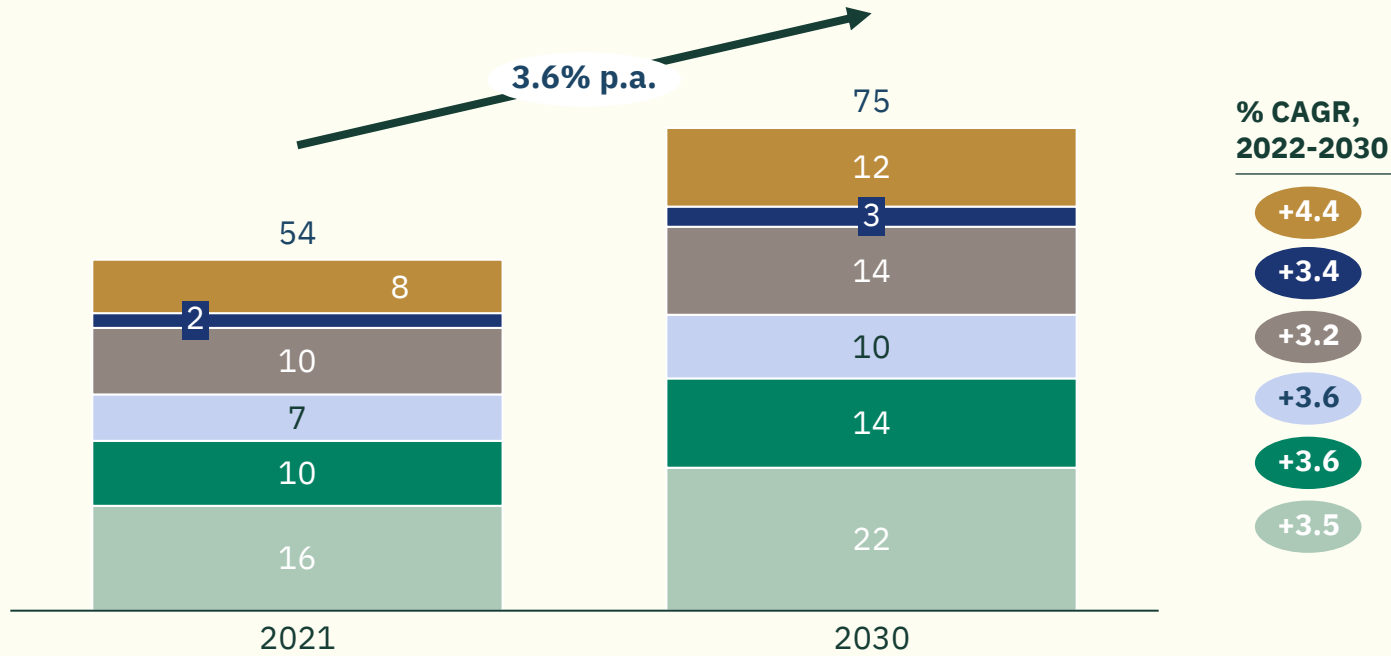
KSA consumption of lubricating oil additives

Market size¹,
USD Mn

181 249

3.6% p.a.

Market size,
KTA



% CAGR,
2022-2030

- +4.4
- +3.4
- +3.2
- +3.6
- +3.6
- +3.5

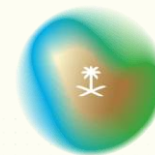
Key insights

- **KSA demand growth for lubricating oil additives is ~3.3x the global demand growth** which is driven by the anticipated growth of the industrial sector and overall GDP
- **Dispersants and detergents represent ~45% of the KSA lubricating oil additives market demand with a CAGR of 3.5% and 3.6% respectively**, given their common use in most lubricants in the industrial and automotive application
- **Viscosity Index improvers are expected to experience the lowest growth rate**, due to the slow growth of automotive application which is the main driver for VI improvers

1. Assumed at current market price

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Thank You