

Local Report

Swiss Market Situation

VSS lubes is the Swiss Association of the Lubricants Industry.



History

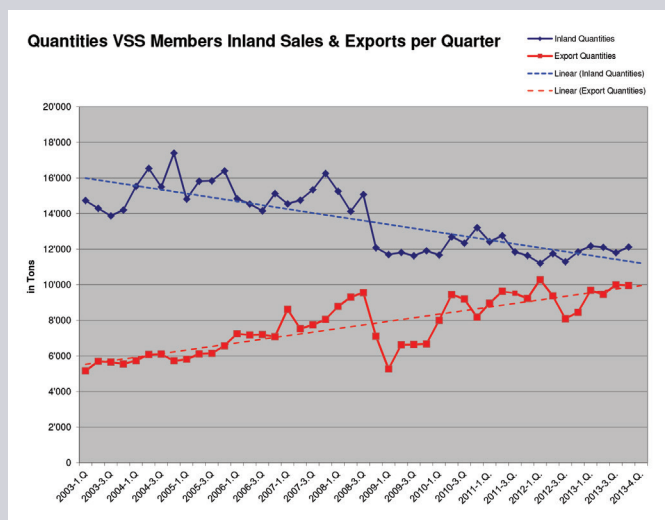
The Association was founded in the year 1932 with the task to become a central point of entry, i.e. central administrative import control point. At a later date the importation authorisation was linked with the obligation to hold stocks. This meant that the lubricants were part of the strategically important products in Switzerland.

After the fall of the Berlin Wall, which produced a far-reaching shift in political and economic power structure in Europe and the world, the Swiss security policy was re-examined. The result was strategic realignment and redefinition of the situation of the Lubricants for Swiss Industry. Lubricants were no longer in the primary care sector, having received a new Assignment as products of unrestricted global supply and, as a result, saw the repealing of mandatory compulsory stocks for lubricants was decided. The physical resolutions of all compulsory stocks were executed in the year 2005.

Today

As of 1st of January 2014 VSS has 46 members, out of which 6 companies are blenders and the other 40 companies are distributors. The blending plants produce for the domestic market and for the export as well. The members of VSS represent over 90% of the domestic market and the Exports.

The quarterly statistics of the quantities of the members of VSS show since the year 2003 two trends. The domestic consumption is steadily diminishing and the exports grow. The main reason for the declining domestic market is due to the percentage of the automotive oils, which represent in Switzerland between 55% and 60% of the total Market for Lubricants.



The last eight Quarters increase in the domestic sales might be seen in increased consumption in the automotive oils, which again have to be seen in relation to the average age of the vehicles. The statistical Data of the Federal Statistical Office

show the average age of the vehicles in the year 1990 was 5.4 years; in the year 2000 was 6.9 years and since 2010 remained constant at the level of 8.2 years.

The breakdown of the Lubricants used in Switzerland shows for the year 2013 following quantities:

Category	In Tons
Engine Oils	19,007
Gear and Machines Oils	4,286
Hydraulic Fluids	8,045
Fat	1,257
Metalworking Fluids	7,065
Highly Refined Oils	690
Other Oils	4,050
Process Oils	2,348
Base Fluids/Additives/Components	1,467

Based on the Federal Customs Statistics of the year 2013, Switzerland imported 81,000 tons of lubricating products and exported 41,100 tons. As Switzerland has no own resources, it is surprising that the Swiss Lubricating Industry exports hold such a high portion of the imported raw materials. This is due to the very high level of expertise and know-how in the field of lubrication technology, which leads to very specialised formulations and recipes.



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LINK
www.vss-lubes.ch