



The lubes and grease market is a complex amalgam of commercial and passenger vehicles, 2- and 3-wheelers, agricultural equipment, stationary engines and industries that range from steel and cement to textiles, automobiles and glass. In this market of opportunity, several brands elbow for space. But with one of Asia's finest research and development facilities supporting it, SERVO comes off as the brand to look out for. It is India's biggest lubricant brand and enjoys a market share exceeding 27% and a turnover nudging ₹8000 crore. SERVO has more than 4000 formulations and 1600 grades of lubricants available in more than 1700 active SKUs that it markets in the country.

### Market

For 44 years after independence the Indian economy lurched forward in fits and starts. Then in a magical moment in 1991 it threw away repressive policies and announced to the world that the country was ready to bite the bullet. India has never looked back since and the only time it may have appeared to pause is possibly to consolidate its gains.

Of the many industries that benefited, the oils and lubes business was one. With restrictions lifted on the import of base oils, additives and finished lubricants, the market witnessed a resurgence. This coincided with the developed markets reaching a plateau.

Paralleling the rise of the Indian market and the stagnation in their own countries, several international brands headed to the new land of the rising sun – a new El Dorado. The toss up has left the three public sector oil companies with a commanding 55% share of the market with the rest being distributed amongst the others.

The size of the Indian lubricant market is estimated at ₹30,000 crore with a volume of approximately 1.60 million metric tonnes (MMT). The cumulative average growth rate (CAGR) over the past five years is pegged at 1.50%. While this growth may appear to be modest compared to other categories, it's more to do with the improved performance of the oils and lubes. Breakthrough technologies now allow these to be changed substantially later thus offering greater value to customers.

With the automobile sector displaying encouraging growth, the lubricant market, too, is buoyant but, because of increasing competition, is facing constant pressure on margins. The highly volatile international base oil markets have further added to the strain.

Automotive lubricants constitute 65% of the total lube market (Source: internal data). Of this, the commercial vehicle segment accounts for half of the volume while the passenger car



segment – the image builder for lubricant brands – constitutes a mere 7%. The 2-wheeler segment, witnessing explosive growth, constitutes about 25%. The balance 18% is split between agriculture equipment, stationary engines and other miscellaneous applications.

### Achievements

Both by way of volume as well as value SERVO is, by far, India's single largest oils and lubes brand. Over the years it has established its authority and, on the strength of its proven quality, built exceptional relationships with manufacturers of cars, heavy commercial vehicles, 2-wheelers, tractors and specialty engines. With leading companies such as Maruti, Hyundai, TATA, Mahindra & Mahindra, Ashok Leyland, Force Motors, Kinetic, Honda, TAFE, Punjab Tractor, Dalian Locomotives, Gabriel, Volvo-Eicher, Timken, TAFE, Renault-Nissan etc., it is the brand of choice and an original equipment supplier to them.

In the field of industrial lubricants, too, SERVO

is the undisputed leader. It offers a wide range of lubricants for use in all core industries such as the railways, defence services, state transport undertakings and steel and cement, amongst others. In the marine oils segment, SERVO has the distinction of being the only Indian lubricant brand to receive approvals for its oils from marine engine builders like MAN B&W and Wartsila Sulzer.

Having achieved distinction in India, SERVO has also made in-roads into the highly competitive global markets. Today, it has established its footprint in 27 global destinations. It has successfully captured significant market shares in Bangladesh and Nepal

and with IndianOil's fully owned subsidiaries in Sri Lanka, Mauritius and the Middle East it is seen as a growing brand in the UAE, Oman, Qatar and Bahrain.

### History


SERVO was launched by IndianOil, India's flagship petroleum refining and marketing company, in 1972. The brand entered the market in collaboration with Mobil. Two years later, when the collaboration ended, SERVO went into an expansion mode. It developed an extensive marketing infrastructure, supported by one of Asia's most advanced research and development centres. Established in Faridabad, a suburb of New Delhi, in 1972, the R&D centre is a world-class facility that has to its credit several significant breakthroughs. Today, the brand is marketed through IndianOil's nation-wide retail outlets now numbering over 24,000.

Concurrent to these developments is the huge supply channel that has been put in place. The network comprises ten ISO-certified lubricant

blending plants, a grease manufacturing unit and several small can-filling stations spread across the country. Since the operation was massive a dedicated distributor set up was put in place to cater to the requirements of the retail outlets and



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### Product

Most people wouldn't know it, but grease and oil are not generic products. Every application has its own specification as well as a unique operating environment. So large is this number that in its stables SERVO has

over 4000 formulations with about 1600 grades of lubricants being marketed in the country. In fact, the brand has such a vast range that it can boast of being able to serve any use in any industry with world-class lubricants.

For decades SERVO has been in the forefront of introducing technologically advanced products. Its SERVO RR 606 MG – especially formulated for the Indian Railways – is a case in point. The fuel and engine oils supplied by SERVO have actually saved them several tens of crores in operating costs.

Similarly, many energy-efficient spindle and gear lubricants, bio-degradable lubricants, long drain diesel engine oils and a series of synthetic-based lubricants are some recent innovations. Another spin-off of SERVO's research is a non-toxic, bio-degradable, residue-free, non-pesticide spray oil which has no side effects. Servo Agro spray oils are a viable alternative for farmers riddled with problems emanating from the side effects of currently used chemical, toxic pesticides.

SERVO vast portfolio of lubricants caters to the needs of the automotive, industrial, marine and specialties segments. The automotive oils include 2T/4T oils, gasoline and diesel engine oils, gear and transmission oils, specialised rail road oils, tractor oils, coolants, brake fluids, automotive greases etc. Many of these oils enjoy the approval of major original equipment manufacturers.

SERVO's industrial oils consist of about 1040 grades of lubricants and greases covering hydraulic, turbine and compressor systems, industrial gears and textile spindles. It has a formidable range of over 160 grades of synthetic oils and 270 grades of speciality oils for specialised applications including cutting fluids, quenching oils, heat transfer fluids, rust preventives and rubber process oils.

### Recent Developments

Being a category leader, SERVO keeps a keen eye on the ever-changing dynamics of the

market. Rising oil prices and the ever-growing clamour for environment protection has resulted in the industry seeking energy-efficient and less polluting engines. In turn, this has pressurised oil manufacturers into delivering cutting-edge products. One of SERVO's latest introductions is the SERVO 4T Synth with advanced synthetic chemistry. This outstanding product caters to the new generation 4-stroke bikes.

On the 4-wheeler front, too, cars are increasingly delivering higher efficiencies and, therefore, demanding more from the oils that lubricate and cool the engines. SERVO Futura Synth, 100% synthetic lubricants, made from poly alpha olefins (PAO) base oils provide the ultimate performance in terms of cleaner engine and longer engine life. SERVO Futura P+, a hybrid synthetic oil meeting the highest specification of API SN, is another superior engine oil as also are SERVO Futura P and Futura D – for petrol and diesel engines respectively.

SERVO has recently upped the ante by introducing long drain oils like Servo Pride XL Plus and Servo Pride Supreme Plus. It has also upgraded SERVO Super Multigrade 20W- 40, its largest selling lubricant grade, to meet CF4 specifications.

Seeing the vast demand – and the need gap – in transformer oils, SERVO has entered this market with SERVO Electra. Special industrial oils like synthetic- and fire-resistant hydraulic fluids for steel mills, governor fluids for turbines and food-grade lubricants to meet the stringent food-grade lube specifications add to the wide product range SERVO offers.

But SERVO is not just technology. On the packaging front SERVO has introduced new designs for all its small packs. These are completely leak-proof and offer enhanced security features such as a hologram to prevent adulteration. Recently, two unique innovations have been introduced in SERVO packaging – rectangular buckets in place of conipails used earlier and the adoption of bi-injection mould caps. These features, not only improve the aesthetics of SERVO packs, they also help arrest adulteration and spurious supplies.

### Promotion

Promotions are an important way of keeping SERVO top-of-mind. The brand undertakes several initiatives such as associating with popular sports like cricket, hockey, football, tennis and badminton. Its campaigns, always prominently positioned in stadiums, have proved to be effective messengers.

On the above-the-line platform SERVO is a prime advertiser on television, radio, press and effectively uses modern media such as the Internet. Each effort is designed to drive home the efficient use of lubricants and the ways to maximise engine performance.

Yet another way of keeping in touch with its audience is to engage with them at a very basic level. Towards this end, SERVO is being promoted at select IndianOil retail outlets with well-designed display racks, a quick lube oil change machine and dedicated Servo boys.

### Brand Values

For more than 40 years SERVO has worked assiduously to earn the trust of man and the respect of machine. Working deep inside the bowels of high-speed

engines where massive heat is generated and friction can cause them to seize, SERVO has discharged an important responsibility with self-belief and commitment.



### Things you didn't know about SERVO

- ▶ SERVO lubricants are exported to 27 countries including Sri Lanka, Mauritius, Bangladesh, Nepal and several countries in the Middle East
- ▶ SERVO commands the highest market share in all the three major product segments, viz. automotive oils, industrial oils and greases.
- ▶ SERVOPRIME 57 turbine oil from SERVO has clocked more than 265,000 hours of operation in 35 years of service in one of the hydel turbines in India. The original oil is still in use
- ▶ The hot sump mill of TISCO in Jamshedpur with a sump capacity of 72,000 litres and the Visakhapatnam Steel Plant with a sump capacity of 92,000 litres exclusively use SERVO
- ▶ SERVO is the 6th oil brand in the world and the only one from the Asia-Pacific region to have been approved by marine engine builders like MAN B&W and Wartsila Sulzer
- ▶ Voith of Germany has approved the synthetic gear oil developed by SERVO for drive gear boxes used by the Delhi Metro
- ▶ SERVO has developed a fully synthetic compressor oil approved by Burckhardt for use in high-pressure reciprocating compressors in submarines
- ▶ Fully synthetic gear oils with anti-micro pitting features developed by SERVO are used in Flender gear boxes operating in steel- cement- and power-plants and wind mill farms

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