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Standard Test Method for Oxidation and Thermal Stability Characteristics of Gear Oils Using Universal Glassware¹

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1. Scope*

1.1 This test method covers the determination of the oxidation characteristics of extreme pressure and non-extreme pressure gear oils and includes the quantitative determination of total sludge, viscosity change, and oil loss.

NOTE 1—While the round-robin tests used ISO VG 220 extreme pressure gear oils for developing precision data, the test method can be extended to other viscosity grades and to non-extreme pressure gear oils. Refer to Classification [D2422](#) for viscosity grades.

1.2 The values stated in SI units are to be regarded as standard. No other units of measurement are included in this standard.

1.3 *This standard does not purport to address all of the safety concerns, if any, associated with its use. It is the responsibility of the user of this standard to establish appropriate safety and health practices and determine the applicability of regulatory limitations prior to use.*

2. Referenced Documents

2.1 *ASTM Standards:*²

[D445](#) Test Method for Kinematic Viscosity of Transparent and Opaque Liquids (and Calculation of Dynamic Viscosity)

[D2422](#) Classification of Industrial Fluid Lubricants by Viscosity System

[D2893](#) Test Methods for Oxidation Characteristics of Extreme-Pressure Lubrication Oils

[D4057](#) Practice for Manual Sampling of Petroleum and Petroleum Products

[D4871](#) Guide for Universal Oxidation/Thermal Stability Test Apparatus

¹ This test method is under the jurisdiction of ASTM Committee D02 on Petroleum Products, Liquid Fuels, and Lubricants and is the direct responsibility of Subcommittee D02.09.0D on Oxidation of Lubricants.

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² For referenced ASTM standards, visit the ASTM website, www.astm.org, or contact ASTM Customer Service at service@astm.org. For *Annual Book of ASTM Standards* volume information, refer to the standard's Document Summary page on the ASTM website.

3. Terminology

3.1 *Definitions of Terms Specific to This Standard:*

3.1.1 *adherent sludge, n*—sludge that is formed on the walls of a container and is not easily removed.

3.1.2 *aliquot, n*—portion of sample being tested that is a representative portion of the whole.

3.1.3 *extreme pressure gear oil, n*—gear oil that contains chemical additives, such as sulfur and phosphorus compounds, which produce a protective film on the metal surface to provide anti-scuffing and anti-scoring properties.

3.1.4 *filterable sludge, n*—sludge that is formed in the oil.

3.1.5 *non-extreme pressure gear oil, n, n*—gear oil that contains no extreme pressure additives.

3.1.6 *oxidation, n*—the process by which oxygen chemically reacts with materials.

3.1.7 *sludge, n—in gear oils*, a precipitate that sometimes forms as the oil ages or oxidizes.

3.1.8 *universal glassware, n*—the glassware that is described in the universal oxidation thermal stability test. Refer to Guide [D4871](#).

4. Summary of Test Method

4.1 The viscosity of the gear oil being tested is determined. A 100-g aliquot of the oil in a weighed apparatus is subjected to a temperature of 120°C for 312 h while dry air is passed through the aliquot at 3 L/h.

4.2 At the end of the stress period, the aliquot is cooled to room temperature. The apparatus is reweighed to determine oil loss. Filterable sludge is recovered by vacuum filtration using a 2.8- μ m glass fiber filter medium. The viscosity of the filtered oil is determined. Sludge adhering to the oxidation cell and associated glassware is rinsed with heptane and the washings passed through the same filter used to filter the filterable sludge. The filter is dried in an oven to a constant weight to determine the total filterable sludge.

4.3 The apparatus is dried and weighed to determine the amount of adherent sludge. The sum of the filterable sludge and adherent sludge is reported as total sludge. The percentage change in viscosity and percent oil loss are also reported.

*A Summary of Changes section appears at the end of this standard

5. Significance and Use

5.1 Degradation of gear oils by oxidation or thermal breakdown, or both, can result in sludge buildup and render the oil unsuitable for further use as a lubricant.

5.2 This is the only test method that employs glassware to measure the amount of sludge produced during oxidation and thermal degradation. This test method is a modification of Test Method **D2893** which measures the viscosity increase and precipitation number of the oil stressed at 95°C, but does not measure the amount of sludge formed.

5.3 This test method can be used to evaluate the oxidation/thermal stability of gear oils. However, the test results may not correlate with the performance of gear oils in field service.

6. Apparatus

6.1 *Heating Bath or Block*,³ thermostatically controlled, capable of maintaining the oil sample in the oxidation cell at a uniform temperature of 120 ± 1°C and large enough to hold a minimum of two oxidation cells and sufficiently deep to allow approximately 120 mm of the test tubes to extend above the heating liquid or block. The heating block is further described in Test Method **D4871**.

6.2 *Oxidation Cell*,³ consists of borosilicate glass; a 38- mm inside diameter and a 300 ± 5-mm length is required.

NOTE 2—While the round-robin test used the oxidation cell from a specific equipment manufacturer in determining the precision statement, the test method permits the use of other oxidation cells that meet the requirements of 6.2.

6.3 *Air Delivery Tube*,³ a borosilicate glass tube having an inside diameter of 5 mm and a minimum length of 320 mm, with the lower tip cut at a 45° angle.

NOTE 3—The oxidation cell and delivery tube are further described in Test Method **D4871**.

6.4 *Flowmeters*,³ one for each oxidation cell, capable of measuring an air flow of 3 L/h ± 0.5 L/h.

6.5 *Air Dryer*—Before being supplied to the flowmeters, the air shall be passed through a drying tower packed with indicating grade anhydrous calcium sulfate or equivalent. The quantity of desiccant should be sufficient to last for the entire test. It is recommended that the drying tower be filled with fresh desiccant prior to the test.

6.6 *Filter*, glass fiber, 2.8-µm porosity, 47 mm in diameter.

6.7 *Balance*, electronic, top-loading, capable of weighing to the nearest centigram (0.01 g) and having the capacity to weigh up to 2000 g.

6.8 *Filter Holder*, 47 mm, consisting of a borosilicate glass funnel and a funnel base with a coarse-grade fritted glass filter support or stainless steel screen support such that the filter can

be clamped between the ground glass sealing surfaces of the funnel and its base by means of a metal clamp.

6.9 *Oven*, explosive-proof, capable of heating from 50 to 60°C and of a sufficient size to hold oxidation cells.

6.10 *Thermometer*, ASTM solvent distillation thermometer having a range from 98 to 152°C or equivalent digital contact thermometer.

6.11 *Vacuum Source*, to provide pressure reduction to 100 ± 5 mm Hg absolute pressure.

7. Reagents and Materials

7.1 *Air Supply*, dried air, oil free, at constant pressure to permit 3 L/h air flow through the system. House air supply or pressurized air cylinders can be used.

7.2 *Calcium Sulfate Desiccant*, Anhydrous, indicating grade (desiccant that changes color when it nears saturation with water). Desiccants equivalent to calcium sulfate can be used.

7.3 *Heptane*—minimum purity, 99.75 %. (**Warning**—Heptane is flammable and a health hazard.)

8. Sampling

8.1 Samples for this test method can come from tanks, drums, small containers, or operating equipment. Therefore, use the applicable apparatus and techniques described in Practice **D4057** to obtain suitable samples.

8.2 Special precautions to preserve the integrity of a sample will not normally be required. It is good practice to avoid undue exposure of samples to heat, sunlight, or strong direct light. Visibly heterogeneous samples should not be used.

8.3 It is recommended that a 200-mL representative be obtained. To ensure the aliquot being tested is representative of the sample, agitation; for example, stirring or shaking of the oil prior to obtaining an aliquot, is recommended.

9. Preparation of Apparatus

9.1 *Cleaning Glassware*:

9.1.1 Clean new glassware by washing with a hot detergent solution (using a bristle brush) and rinse thoroughly with tap water. When any visible deposits remain, soaking with a hot detergent solution can be helpful. After final cleaning by soaking with a suitable cleaning solution rinse thoroughly with tap water and then distilled water, and allow to dry at room temperature or in an oven.

9.1.2 Used glassware should be cleaned immediately following the end of a test. When additional cleaning is necessary, use a non-chromic acid containing cleaning solution.

9.2 *Heating Block or Bath*—Ensure that the heating block or bath is able to heat the oxidation cell at the control temperature of 120°C.

9.3 *Flowmeter*—Ensure that the flowmeter is capable of delivering the desired flow rate of 3.0 L of air per hour.

10. Procedure

10.1 Using Test Method **D445**, determine the viscosity of the oil at 100°C. Record as V_2 .

³ The sole source of supply of the apparatus (universal glassware and heating bath with flowmeters as a complete unit) known to the committee at this time is Falex Corporation, 1020 Airpark Drive, Sugar Grove, IL 60554-9452. If you are aware of alternative suppliers, please provide this information to ASTM International Headquarters. Your comments will receive careful consideration at a meeting of the responsible technical committee,¹ which you may attend.