

# *Product Catalog*

## **Energy Practice**

2012



## Table of Contents

3	Finished Lubricants
7	LubesNet Database
8	Lubricant Basestocks
9	Petroleum Specialties
10	Contact
11	MyKline

## Opportunities in Lubricants, 2011-2013:

North American Market Analysis

### In Continuous Publication Since 1984

A three-volume service

- Each volume details information and insights into specific end-use industries and is organized to reflect the industry's view of market segmentation
- Provides an examination of the continuing demand shifts throughout the entire market in critical areas, such as viscosity grade, conventional to synthetic formulations, and retail to installed service providers
- All data tables in the published report will be provided in an Excel database format to support internal analysis and "what if" scenarios based on your own perspective and assessment of current and future market conditions

#### Volume I: Commercial Automotive:

To be published 2nd quarter 2012

Base year: 2011

#### Volume II: Consumer Automotive:

To be published 2nd quarter 2013

Base year: 2012

#### Volume III: Industrial Oils and Fluids:

To be published 2nd quarter 2014

Base year: 2013

Regions covered: North America \* Mexico

Report #Y59AABBCC

## Opportunities in Lubricants, 2008-2010:

North American Market Analysis

#### Volume I: Commercial Automotive

Published 2nd quarter 2009

#### Volume II: Consumer Automotive

Published 2nd quarter 2010

#### Volume III: Industrial Oils and Fluids

Published 3rd quarter 2011

Report #Y59XYZ

## Opportunities in Lubricants 2011: China

Market Analysis

- A comprehensive analysis of the fast growing Chinese lubricant market focusing on market size and growth, quality evolution, key trends, developments, challenges and threats, and business opportunities
- Profiles leading participants in the Chinese lubricants market

Published 4th quarter 2011

Report #Y584C

## Opportunities in Lubricants 2010: India

Market Analysis

- Provides an analysis of the Indian lubricants market, focusing on key trends, developments, challenges, business opportunities, and threats
- Shows competitive positioning amongst the MNC suppliers, NOC/PSU suppliers, and other local independents

Published 3rd quarter 2010

Report #Y691

## Opportunities in Lubricants 2011: Russia

Market Analysis

- A detailed independent appraisal of the Russian market, including current and forecast demand by market segment, product type and end-use application
- Lubricant consumption, product selection criteria, distribution channels, and formulation usage will also be assessed

To be published 3rd quarter 2012

Report #Y703

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for over 50 years

## Global Lubricants 2011:

Market Analysis and Assessment

\* formerly Competitive Intelligence for the Global Lubricants Industry

- A comprehensive assessment of both suppliers to and the finished lubricant global markets
- Provides finished lubricant formulators, additive and basestock suppliers, and end users with the latest information on products, services, applications, and trends in the leading lubricant consuming regions of the world
- Designed to help identify where, when, and how to focus capital expenditures on current and emerging business opportunities

To be published 3rd quarter 2012

Regions covered: North and Latin America \* Eastern and Western Europe \* Africa and the Middle East  
Asia-Pacific

Report #Y533I

## Global Lubricants 2010:

Market Analysis and Assessment

Published 3rd quarter 2011 Report #Y533H

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## Global Passenger Car Engine Oil Suppliers 2011:

Customer Value-Added Analysis

- Designed to help answer a number of strategically important questions regarding how manufacturers of passenger car engine oil products are viewed by their automotive OEM customers and how they compare to their competitors in key areas

To be published 1st quarter 2012

Regions covered: North America \* South America: Argentina and Brazil \* Europe: Germany, France, Italy, Poland, Czech Republic, Russia and Turkey \* Asia-Pacific: Japan, South Korea, China, India, Malaysia, Indonesia and Thailand

Report #Y702

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## Metalworking Fluids 2010 Global Series:

Market Analysis and Opportunities

- A comprehensive study of the global metalworking fluids industry examining the lasting impact of the recession on this industry in terms of size, regions, products, technology, and market trends, and "post-recession" growth
- Designed to provide metalworking fluid formulators, marketers, additive suppliers, and end users with the latest information on products, services, applications, and trends

Published 2nd quarter 2011

Regions covered: Americas \* Europe \* Asia-Pacific

Report #Y650B

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## Nationalized Oil Companies 2010:

A Competitive Assessment

- Competitive assessment of each of the leading nationalized oil companies (NOCs) and privately-owned oil companies (POCs)
- Provides insights on the future competitive threat that these companies might pose to international oil companies (IOCs)

Published 2nd quarter 2011

Report #Y695

## Global Synthetic Lubricants 2011:

Market Analysis and Opportunities

- A global analysis of the synthetic lubricants business focusing on changes, challenges, and business opportunities
- Includes information about the size of the synthetic lubricants market, its growth potential, the key drivers for growth, the leading markets, end-use segments, and product segments for synthetic lubricants globally

To be launched 2nd quarter 2012

Regions covered: North and South America \* Eastern and Western Europe \* Asia-Pacific

Report #Y646B

## Global Synthetic Lubricants 2010:

Market Analysis and Assessment

Published 4th quarter 2010 Report #Y646A

## Global Industrial Oils and Fluids 2011:

Market Analysis and Opportunities

- A comprehensive analysis of the diverse end-use industries and products that make up the industrial oils and fluids market
- Designed to provide insights by region, end-use industry, and product categories revealing key industry trends by different end-use markets or opportunities in environmentally friendly industrial oils, food grade lubricants, and other specialty products

Products covered:	Process Oils	To be published 2nd quarter 2012
	General Industrial Oils	To be published 2nd quarter 2012
	Industrial Engine Oils	To be launched 2nd quarter 2012
	Metalworking Fluids	To be launched 2nd quarter 2012
	Greases	To be published 2nd quarter 2012

Regions covered: Americas \* Europe \* Asia-Pacific

Report #Y708

## Lubricants for Wind Turbines 2011:

Global Market Analysis and Opportunities

- A comprehensive analysis of the global market for wind turbine lubricants by region and product categories
- Designed to provide subscribers with understanding regarding OEM and wind farm operator requirements on product performance to assist product development and product differentiation
- Provides an appraisal of government policy, market trends and supply and demand drivers, enabling subscribers to position themselves or develop new products to capitalize on these trends

Published 1st quarter 2012

Regions covered: Americas \* Europe \* Asia-Pacific

Report #Y716

## Lubricants for Motorcycles, Scooters, and Mopeds 2011:

Global Market Analysis and Opportunities

- A comprehensive analysis of the global market for two-wheeler lubricants by region and product categories
- Assesses evolving lubrication needs by two-wheeler and engine type
- Provides an appraisal of leading suppliers of two-wheeler oils, their positioning, and market strategy

To be published 1st quarter 2012

Regions covered: Americas \* Europe \* Asia-Pacific \* Africa and the Middle East

Report #Y721

## Lubricants in the Global Mining Industry, 2011-2016:

Market Analysis and Assessment

- A detailed appraisal of the lubricants market serving the mining industry in key mining countries
- All major segments of the mining industry including coal, aggregates, nonmetallic minerals and metallic minerals will be covered
- Lubricant products consumed by mobile and stationary equipment will be covered and will be segmented into individual product categories including HDMO, hydraulic and transmission fluids, gear oils, industrial hydraulic fluids, other general industrial oils, grease, and other products
- The study will help lubricant marketers identify business opportunities in the global mining industry

To be published 3rd quarter 2012

Regions covered: Africa \* Americas \* Australia \* Eurasia

Report #Y723

## LubesNet Database 2012

- An interactive global database of finished lubricant demand
- Enables searches and analysis using multiple criteria to capture data broken down by country, market segment, product category, product type, and viscosity grade levels
- LubesNet features the FutureView forecasting tool, allowing users to easily change variables to run various "what if" demand scenarios. For example, if the Chinese economy does not continue its strong growth, and the lubricant market grows by 3% instead of 7%, what will be the impact on demand? Similarly, if consumption in Germany declines by 1% instead of the projected 3%, how will that shape the path forward? Or if viscosity grades do not change at the suggested rate, or if performance changes do not occur, what might the resultant demand look like?

Published 1st quarter 2012

Regions covered: Asia-Pacific \* North and Latin America \* Europe \* Africa and the Middle East

Report #Y634E

### Sample User Interface of the Database

The screenshot shows the LubesNET Database Service interface. At the top, there's a navigation bar with 'LUBESNET HOME', 'MY KLINE', 'CORPORATE WEBSITE', 'CONTACT US', 'HELP', and 'LOGOUT'. Below this is a search section with 'Advanced Search' and four numbered filters: 1. Africa, Middle-East; 2. Select Country; 3. ALL; 4. KTonnes. There are also checkboxes for 'Supporting Data' including Lubricant Supplier Market Share, Synthetic Lubricant Market Penetration, Overall Vehicle Population, FutureView Assumptions, and Segmentation Definitions.

The main data table is titled 'FutureView Lubricant Demand (KTonnes)' for South Africa. It has columns for 'Products / Grades', 'Calculator', and 'Average Annual Growth Rate(%)' for the years 2008, 2012, and 2017, plus 'Total' columns for demand and growth rate. The table lists various lubricant grades under 'CONSUMER LUBRICANTS'.

Products / Grades	FutureView Lubricant Demand (KTonnes)						Total				
	Calculator	South Africa			Total						
	2008	2012	2017	2008 to 2012	2012 to 2017	2008	2012	2017	2008 to 2012	2012 to 2017	
<b>CONSUMER LUBRICANTS</b>											
PCMO		82.7	87.8	95.1	1.5	1.6	82.7	87.8	95.1	1.5	1.6
Multigrade		49.5	53.6	59.3	2.0	2.0	49.5	53.6	59.3	2.0	2.0
20W40 / 20W50		43.1	46.7	51.6	2.0	2.0	43.1	46.7	51.6	2.0	2.0
Other multigrade		6.4	6.9	7.7	1.9	2.2	6.4	6.9	7.7	1.9	2.2
Monograde		31.7	32.6	34.0	0.7	0.8	31.7	32.6	34.0	0.7	0.8
SAE40		30.1	31.0	32.3	0.7	0.8	30.1	31.0	32.3	0.7	0.8
Other monograde		1.6	1.6	1.7	1.2	1.2	1.6	1.6	1.7	1.2	1.2
2T4T, MCO		1.5	1.6	1.8	1.6	2.4	1.5	1.6	1.8	1.6	2.4
2T4T, MCO		1.5	1.6	1.8	1.6	2.4	1.5	1.6	1.8	1.6	2.4

Buttons at the bottom include 'RESET', 'EXPORT TO EXCEL', and 'SEND TO PRINTER'. The footer shows '© Kline and Company | Best Viewed at 1024x768.'

## Global Lubricant Basestocks, 2012

In Continuous Publication Since 2007

- An objective assessment of the present basestocks business and its future direction
- Includes three modules covering lubricant basestock supply-demand analysis, manufacturing cost analysis, and price analysis and forecast.

To be published 2nd quarter 2012

Regions covered: North and South America \* Eastern and Western Europe \* Africa and the Middle East  
Asia-Pacific \* Rest of the World (ROW) (primarily will include former CIS states and others)

Report #Y618CDE

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## Lubricant Basestocks in Africa and the Middle East 2010:

Market Analysis and Opportunities

- An analysis of the lubricant basestock market in Africa and the Middle East covering supply, demand, market trends and their impact on blend recipes, market challenges, and business opportunities
- Includes access to Kline's proprietary lubricant basestock supply-demand model, and estimates basestock demand by API group and viscosity grades on the basis of finished lubricant consumption in the region and market average blend recipes

Published 4th quarter 2010

Report #Y693

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## Global Synthetic Lubricant Basestocks 2012:

Market Analysis and Opportunities

- A comprehensive analysis of the synthetic lubricant basestocks business, focusing on changes, challenges, business opportunities and threats in:
  - Alkylated aromatics (alkylated benzenes and alkylated naphthalenes)
  - API Group III baseoils
  - GTL baseoils
  - Polyalkylene glycols (PAGs)
  - Polyalphaolefins (PAOs)
  - Polyisobutanes (PIBs)/polybutenes
  - Phosphate esters
  - Synthetic esters (Monoesters, Diesters, Polyol esters, other esters)
  - Others (silicones, PTFEs, PFPEs, and others)

To be published 4th quarter 2012

Regions covered: Asia-Pacific \* Europe \* North America \* South America

Report #Y709

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## The Global Business Outlook for Brightstocks, 2010 - 2020

- Focusing on paraffinic and naphthenic brightstocks used in commercial automotive, consumer automotive, and industrial lubricant and functional fluid applications
- The study is designed to provide subscribers with the insights required to construct sound business plans and capitalize on emerging opportunities in the highly dynamic lubricant basestock business

Published 4th quarter 2011

Regions covered: Africa and the Middle East \* Asia-Pacific \* Europe \* Latin America \* North America

Report #Y604A

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## Global Naphthenic Basestocks Market

- An objective assessment of naphthenic basestocks supply, demand, and outlook, and the impact on pricing
- Key application areas (tire and rubber, transformer oils, metalworking fluids, process oils, other applications) are described and naphthenic basestocks are compared to competing products

## Fuel Additives 2011:

Market Analysis and Opportunities

This report provides a comprehensive analysis of the fuel additives market and addresses such important questions as:

- What is the size of the global fuel additives market by product type and chemical class?
- What are the additive requirements of new fuels (biodiesel, ethanol, GTL, etc.)?
- What are the emerging regulations covering fuel quality and emissions, and how do they affect additive demand?

To be published 2nd quarter 2012

**Regions covered:** North and South America \* Europe \* Asia \* Africa and the Middle East

Report #Y431A

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## Global Lubricant Additives 2011:

Market Analysis and Opportunities

- An analysis of the global market for lubricant additives, focusing on estimated consumption by function class and additive type
- Includes information on key trends, market developments, challenges, and business opportunities

To be published 3rd quarter 2012

**Regions covered:** North and South America \* Europe (EU and non-EU countries) \* Asia-Pacific  
Africa and the Middle East

Report #Y655B

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## Global Lubricant Additives 2010:

Published 3rd quarter 2011 Report #Y655A

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## Global Used Oil 2009:

Market Analysis and Opportunities

This report provides a comprehensive analysis of the global used oil market and addresses such important questions as:

- How is used oil currently disposed within each region?
- What share of used oil is re-used for energy recovery and what share goes to other dispositions within each region?
- What share of used oil is re-refined and used within finished lubricants in each region?

Published 2nd quarter 2010

**Regions covered:** North and South America \* Western Europe \* Asia-Pacific \* Rest of World

Report #Y684A

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## Global Wax Industry 2010:

Market Analysis and Opportunities

- A comprehensive analysis that highlights global supply and demand of waxes including animal-based, vegetable-based, mineral, and such synthetic waxes as Fischer-Tropsch (F-T), alpha-olefin (A-O), and polyethylene (PE) waxes
- This study will address "neat" GTL waxes, as well as the potential for GTL waxy raffinates to be processed in conventional refineries and blended with petroleum waxes to increase global wax volumes

Published 4th quarter 2010

**Regions covered:** North and Latin America \* Europe \* Asia-Pacific \* Africa and the Middle East

Report #Y635A

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## In-Depth Report Series

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“The fact that all of our staff is recruited from industry enables us to present our clients with very pragmatic business solutions.”

Geeta Agashe  
Vice President, Energy

## Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer industries for over 50 years.

Kline's research and consulting services extend across the entire energy industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

## Kline Methodology

Kline is unmatched in the ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts will conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including manufacturers and marketers, distributors, suppliers, public relations executives, and other direct influencers.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research comprises the bulk of the overall research methodology.

In addition, our analysis is supplemented by secondary research drawn from marketers' product literature and price lists, financial reports, a search of recent trade and professional publications, Internet sources, and statistical data from government, industry, and trade associations and agencies.

Americas

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Asia

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Europe



Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

For more information, visit [www.klinegroup.com](http://www.klinegroup.com)

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