

Global Synthetic Lubricants 2008:

Market Analysis and Opportunities

Published 1st Quarter 2008

Base Year: 2007

Regional Coverage

North America

Western Europe

Eastern Europe

South America

Asia-Pacific

A comprehensive global analysis of the synthetic lubricants business, focusing on key changes, challenges, and business opportunities and addressing such questions as:

- What is the size of the synthetic lubricants market? What is its growth potential?
- What are the key drivers for growth?
- What are the leading regional markets, end-use segments, and product segments for synthetic lubricants globally?
- Who are the leading marketers of synthetic lubricants, and what is their market share?
- What do synthetic lubricants cost to formulate, and what margins do they deliver?
- What does the supply availability look like for key synthetic lubricant raw materials?
- What impact will greater availability of API Group III and GTL (Group III+) basestocks have on synthetic lubricants?
- Where are the opportunities for basestock, additive, and finished lubricant marketers?

Report Scope

Global Synthetic Lubricants 2008: Market Analysis and Opportunities is an in-depth analysis designed to provide subscribers with an accurate and independent resource to assess and pursue business opportunities in the synthetic lubricants business. It provides an excellent resource for manufacturers and marketers of finished lubricants, basestock producers, additive suppliers, and others in the lubricant supply chain to build solid strategic plans and respond to competitive forces, emerging technologies, and evolving market needs.

The study focuses specifically on synthetic lubricants used in the consumer automotive, commercial automotive, and industrial market segment. The study is global in scope and organized by major geographic region.

Key Benefits

Global Synthetic Lubricants 2008: Market Analysis and Opportunities provides subscribers with an accurate and independent appraisal of market size and segmentation, key end-use segments and trends, business opportunities, and competitive forces in the global synthetic lubricant and functional fluids business.

Specifically, the report assists subscribers by providing:

- An examination of business opportunities globally, existing markets for synthetic lubricants, emerging markets, new product developments and channels to market
- A highly reliable and independent assessment of global synthetic lubricant consumption and market shares
- An unbiased appraisal of market trends and emerging applications
- Competitive intelligence for use in benchmarking
- A resource for screening potential merger and acquisition candidates

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Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

Includes Kline's FutureView Scenario Forecasting Model

3. GLOBAL DEMAND ANALYSIS AND FORECAST

- 3A. Consumer Automotive Lubricants
- 3B. Commercial Automotive Lubricants
- 3C. Industrial Oils and Fluids

For each of the finished lubricant types listed in Table 1, the following information is provided:

- Demand analysis (base year 2007)
 - By end-use applications (see Table 2)
 - By major geographic region
- End-user analysis
 - Products
 - Suppliers
 - Pricing
 - Product positioning
 - Product developments
 - End-use market developments
- Price/performance trade offs
 - End-user considerations when selecting synthetics
 - Cost to formulate synthetic lubricants and margins delivered
- Emerging applications
 - Consumer automotive
 - Commercial automotive
 - Industrial
- Business outlook
 - Uncertainties
 - Opportunities
- Demand forecasts to 2012 and 2017

4. DEMAND DRIVERS TO 2017

5. RAW MATERIAL AVAILABILITY AND TRENDS

This chapter includes a brief assessment of the overall availability of the following key raw materials, as well as prices, end-use applications, and emerging trends:

- Esters
- Polyalkylene glycols
- Alkylated aromatics
- Polyalphaolefins
- Gas-to-liquids (Group III+) base oil
- Group III paraffinic basestocks
- Chlorotrifluoroethylene
- Perfluoroalkylpolyethers
- Phosphate esters
- Polybutenes
- Silicone fluids

6. SUPPLIER PROFILES

For each of the suppliers listed in Table 3, the following information is provided:

- Background and structure
- Manufacturing
- Products
- Applications
- Revenues
- Outlook and appraisal

7. BUSINESS OPPORTUNITIES

Table 1
List of Lubricant Products Covered in Each Market Segment

Consumer automotive	Commercial automotive	Industrial	
Passenger car motor oil	Heavy-duty engine oil	Compressor and refrigeration oils	Hydraulic oil
Passenger car diesel oil	Hydraulic and transmission fluid	Turbine and circulating oils	Industrial engine oil-a
Gear oil	Gear oil	Gear oil	Metalworking fluids
Automatic transmission fluid	Grease	Grease	Process oil-b
Grease			Others-c
Two/four-stroke engine oil			

a- Includes natural gas engine oil, railroad engine oil, marine engine oil, and piston aircraft engine oil.

b- Includes oils used in electrical, textile, cosmetic and toiletry, plastic, and other manufacturing processes.

c- Includes instrument oil, immersion oil, seal oil, and other industrial lubricants and functional fluids.

Table 2
List of End-Use Segments Covered in Each Leading Product Application Category

- | | |
|-------------------------|------------------------------|
| ■ Consumer Automotive | ■ Industrial Oils and Fluids |
| - Installed | - Agriculture |
| - Retail | - Chemicals |
| ■ Commercial Automotive | - Construction |
| - On-highway | - Food processing |
| - Off-highway | - Machinery |
| | - Mining |
| | - Oil and gas |
| | - Power and energy |
| | - Primary metals |
| | - Textiles |
| | - Transportation equipment |
| | - Wood and paper |
| | - Other |

Table 3
List of Finished Lubricant Marketers Profiled

- | | |
|------------------|--------------------------|
| ■ AMSOIL | ■ Houghton International |
| ■ Anderol | ■ Kuwait Petroleum |
| ■ BP | ■ Neste Oil Corporation |
| ■ Chevron | ■ NYCO |
| ■ CITGO | ■ Quaker Chemical |
| ■ CLC Lubricants | ■ Royal Dutch Shell |
| ■ ConocoPhillips | ■ Royal Purple |
| ■ Dow Corning | ■ Total |
| ■ ExxonMobil | ■ Valvoline |
| ■ Fuchs | |

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Methodology

Kline is unmatched in our 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 conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including finished lubricant manufacturers and marketers, distributors and suppliers, basestock refiners, lubricant additive suppliers, leading OEMs, key end users, and other direct influencers on brand and supplier purchase decisions.

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 will represent the bulk of our research efforts.

In addition, this analysis will be supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

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 products industries for nearly 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.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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- Natural Gas Markets in the Coastal Provinces of China 2008: Economic and Volumetric Implications for Gas Suppliers
- Opportunities in Lubricants, North America
- The Chinese Lubricants Market
- Global Lubricant Additives

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