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LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007

Fourth Edition

An in-depth analysis of the North American lubricant additives market, covering the United States, Canada, and Mexico

Kline and COMPANY

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Kline & Company is pleased to announce the publication of ***LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007***, a comprehensive analysis of the nearly $1.7 billion chemical additives business for lubricants in the North America. The study is specifically designed to provide subscribers with an accurate and independent appraisal of market dynamics and opportunities. It is an invaluable resource for:

- Additive manufacturers
- Chemical raw material suppliers
- Finished lubricant manufacturers and marketers
- Lubricant basestock manufacturers
- Automotive OEMs
- Chemical distributors
- Financial analysts

The study is an excellent resource to use in growing your business. In addition to a detailed analysis of market size and segmentation, it offers insights and information required to capitalize on business opportunities by understanding market needs, future trends, and competitive forces.

The study will be of particular value to additive suppliers and finished lubricant formulators and marketers as the industry moves to optimize additive packages and treat rates with higher-performance basestocks such as API Group II, II+, and III. The advent of the first commercially available gas-to-liquid (GTL) basestocks in this timeframe will also be of a particular interest to industry participants, as will the impact of industry specifications such as ILSAC GF-4 and PC-10.

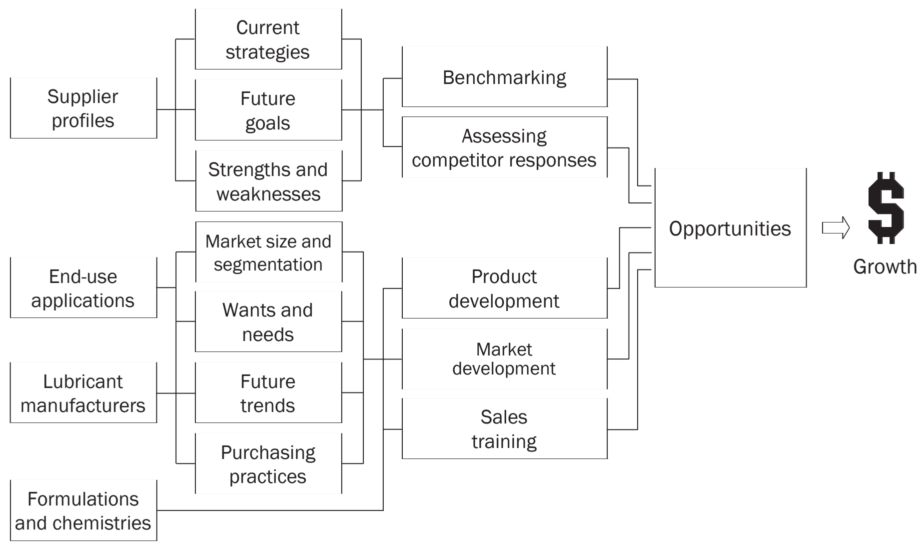
LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007 is structured as a pathway to growing your business, as illustrated in Figure 1. This pathway includes an independent assessment of suppliers, end-use applications, lubricant manufacturers, and formulations and chemistries. Within each area it looks at such critical business issues as:

- Market size and segmentation
- Consumer wants and needs
- Purchasing practices
- Technology
- Future trends
- Competitive intelligence (strengths, weakness, strategies)

TABLE OF CONTENTS

Figure 1

PATH TO GROWING YOUR BUSINESS



BACKGROUND

Automobile OEMs have been driving lubricant specifications in the United States for many years. These automobile OEMs are not only looking to their engine crankcase and driveline lubricants to help them on the lubrication front but also in two specific areas. The first area is help to meet legislative requirements that are brought about as a result of environmental pressures, and the second is their interest in meeting their customers' demand for reducing operating costs and/or downtime faced for maintenance activities.

The legislative regulations currently in place are mainly geared toward improving the average fuel economy of the automobiles as well as meeting certain stringent emission control standards that have an impact on the cleanliness of engines. On the other hand, the automobile OEMs' shareholders are looking to the automakers to increase their market share and profitability, which can be accomplished by devising higher-performing and more durable vehicles at lower costs and in styles that are attractive to their customers.

All of these changes have resulted in more rigorous performance standards for automotive lubricants such as GF-3, GF-4, CI-4, PC-10, and others. In the industrial oils arena, these pressures have also had a significant impact on the decisions regarding additives and basestocks used in formulations.

In addition, the increasing availability of API Group II, II+, and III basestocks—along with the possibility of new GTL basestock supplies, which will bring even better-performing, higher-VI automotive lubricants to the marketplace—will have a significant impact on the speed and magnitude of the change in the coming time period.

SCOPE

The study focuses specifically on additives used in North America (United States, Canada, and Mexico) for lubricants such as automotive, metalworking, industrial engines, and grease. In addition, it details additive use in the wide range of lubricants formulated for general industrial applications, including hydraulic oil, industrial gear oil, compressor and refrigeration oil, turbine oil, and others. The base year for the study is 2002 and will include forecasts to 2007.

STUDY OBJECTIVE AND CONTENTS

The objective of ***LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007*** is to provide subscribers with an accurate and independent appraisal of business opportunities and competitive forces in the North American lubricant additives business.

To achieve this objective, the project team analyzed the market by conducting extensive primary research with lubricant additive suppliers, finished lubricant formulators and marketers, basestock manufactures, equipment OEMs, and other industry participants.

In addition to presenting market size and segmentation data from this research, the study is rich in information and insights into additive chemistries, treat rates and costs, future trends, and other issues tied to business opportunities. A table of contents for the study is shown on the second page of this prospectus, and the core sections of the study are discussed below.

Applications. ***LUBRICANT ADDITIVES, NORTH AMERICA: 2002-2007*** provides an in-depth analysis of additive consumption in 20 end-use applications, including those in automotive, metalworking, industrial engines, and general industrial (see the tentative table of contents for a complete listing). Each end-use application chapter includes a concise analysis of additive function classes, formulations, treat rates and costs, and other critical factors related to additive consumption and purchasing practices.

The end-use application chapters also includes an analysis of future trends and business opportunities.

The business opportunities analysis will be particularly valuable for marketers seeking to identify niches to match their core competencies and grow their business. An outline of the end-use chapters is shown in Table 1.

Additive function classes. The additive function class sections examine additive consumption by function class. Function class describes the specific role that the additive plays in enhancing the performance of lubricants and includes products such as VI improvers, detergents, dispersants, antioxidants, extreme-pressure additives, and pour-point depressants, among others.

As with the end-use application section of the study, market size and segmentation information represents only part of the section's value. This section is also designed to provide subscribers with insights into business opportunities.

An outline of the information included for each function class featured in the study is shown in Table 2.

Supplier profiles. Understanding the competition is basic to growing your business. This is particularly critical in the lubricants additives business, in which sales are concentrated among few suppliers and competition is very intense.

Table 1

OUTLINE OF END-USE CHAPTERS

- Introduction
- Applications
- Additive function
- Formulations
- Packages and components
- Treat rates
- Additive costs
- Consumption
  - Lubricant
  - Additive
  - Chemical class
  - Channels
- Additive suppliers
- Market developments
- Outlook
- Appraisal and opportunities

Table 2

TENTATIVE OUTLINE OF FUNCTION CLASS SECTION

- Properties
- Specifications
- Product designation
- Consumption
- Supply
- Distribution
- Pricing
- Market developments
- Outlook
- Appraisal and opportunities

The supplier profiles featured in ***LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007*** provide subscribers with an excellent resource to sharpen their awareness of the position of suppliers in the marketplace. The profiles offer insights not only into the strengths and weaknesses of the competition but are also an excellent resource to benchmark your business activity. This awareness can be a powerful tool in developing a solid strategy to enhance your company's competitive edge.

Each company profile provides information on the suppliers overall business activity, products and markets, organizational structure, channels of distribution, research and development, and plants and facilities. In addition, the profiles offer an overall appraisal of the company's position in the marketplace and future outlook.

METHODOLOGY

As the leading consultancy on lubricant-related issues, Kline has developed a program based heavily on primary research (field and phone interviews). This approach has a proven track record as the most effective and reliable in analyzing the additives business and identifying business opportunities.

LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007 has leveraged our contacts in the industry and employed the use of primary research to capture data and insights from a wide range of industry experts and opinion leaders. The functional areas targeted for the study are shown in Figure 2.

Although primary research is by far the leading source of information in the study, this was supplemented by secondary research. This secondary research includes: 1) a review of supplier's product literature and price lists; 2) a search of recent trade and technical literature; and 3) an analysis of statistical data from government agencies, industry organizations, and trade associations.

SUBSCRIPTION TERMS AND PRIVILEGES

LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007 is available only by subscription.

In order to maximize the value and usefulness of this program to its participants, the following privileges and services will be made available:

- **One day of strategic planning assistance** with members of the project team at the Kline Group's offices in Little Falls, NJ, or Brussels, Belgium, to be used at the client's discretion within three months of receipt of the report. This meeting is typically used as a company-specific work session to help each subscriber obtain maximum value from both the program and Kline's extensive expertise.
- The option of **hard copy or online versions** of the report. Subscribers can elect to receive three hard copies of the report or, alternatively, the online version. The online version includes unlimited online access to the report contents for members of the subscribing company, plus one hard copy. Additional hard copies will be made available for a nominal fee.

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- Brussels, Belgium
- Tokyo, Japan
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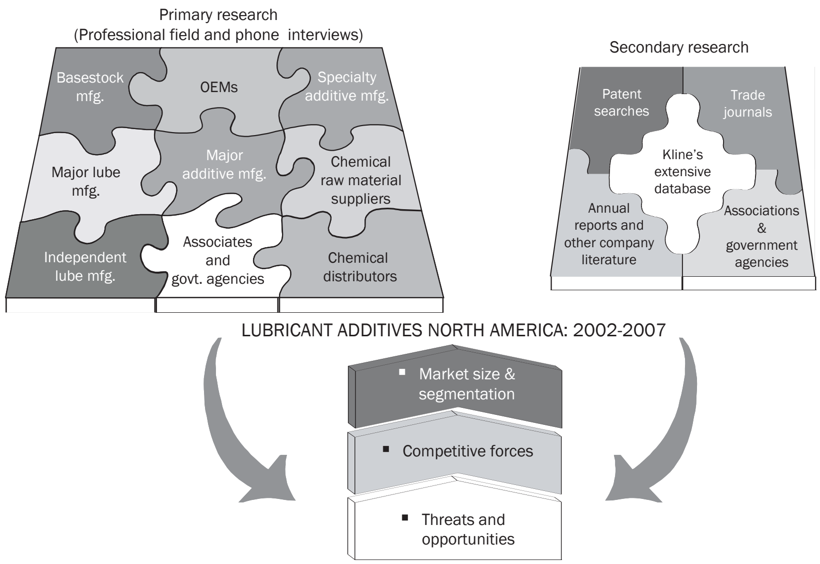
- Melbourne, Australia
- Kuala Lumpur, Malaysia
- Shanghai, China
- Sao Paulo, Brazil

Figure 2

RESEARCH COMPONENTS AND METHODOLOGY



Since its inception in 1959, Kline has earned a reputation for delivering high-quality studies for market and technology assessments. We publish approximately 25 multiclient research reports and complete around 200 customized consulting assignments every year.

Many of these projects have examined various market segments in the basestock, additive, and finished lubricant industries and their participants, and many have been global in scope.

Clients and subscribers include basestock manufacturers, finished lubricant manufacturers and marketers, additive manufacturers and marketers, and specialty basestock suppliers.

Over the past three decades, Kline's Petroleum & Energy Practice has used information from these projects to compile a substantial database on the petroleum and lubricants industries. The leading source of data is previously published syndicated analyses, including the following titles:

— COMPETITIVE INTELLIGENCE FOR THE GLOBAL LUBRICANTS INDUSTRY, 2002-2012
— GLOBAL BUSINESS OPPORTUNITIES IN METALWORKING FLUIDS, 2001-2003
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— LUBRICANT BASESTOCKS, THE AMERICAS 2000
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— THE OUTLOOK FOR PETROLEUM WAXES, 1990-2000

Kline & Company helps management solve practical issues in marketing, strategy development and implementation, acquisition and divestiture programs, and the appraisal of new technology. Kline provides its clients with facts, forecasts, and recommended solutions to business problems, based solidly on the realities of the market and modern strategic principles.

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LUBRICANT ADDITIVES NORTH AMERICA: 2002-2007

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