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BUSINESS OPPORTUNITIES IN METALWORKING FLUIDS WESTERN EUROPE 2001

The latest analysis in Kline's Continuing Global Analysis of Metalworking Fluids series, offering comprehensive information on this important segment of the global lubricants industry



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Metalworking fluids continue to be one of the shining stars in the lubricants business. Unlike other lubricant market segments in which commoditization is weaving its way through the fabric of the business and is compressing margins, the metalworking fluids business is quite healthy and offers interesting opportunities.

BUSINESS OPPORTUNITIES IN METALWORKING FLUIDS WESTERN EUROPE 2001 provides subscribers with analysis of business opportunities based on four dimensions:

- End-use industry
- Product portfolio
- Size and resources of the metalworking fluid supplier
- Country

Although the report does include vital statistics on the size and segmentation of the metalworking fluids business in Western Europe, its primary objective is to deliver subscribers a high-value analysis of business opportunities in the region. Opportunities are presented in areas such as high-speed cutting, microlubrication, hydroforming, and chemical management services.

REPORT CONTENTS

1. EXECUTIVE SUMMARY

A concise, executive-style overview of key report findings, developments, and opportunities.

2. INTRODUCTION

Background information on the scope, methodology, and terminology used in the report.

3. END-USE INDUSTRIES

This section of the report discusses the structure and trends of the end-use industries listed below in regard to metalworking fluid and provides supply and demand data, as well as opportunities and forecasts:

- Transportation equipment
- Fabricated metal products
- Machinery
- Primary ferrous products
- Primary aluminum products
- Metal cans
- Other end-use industries

4. COUNTRIES

This section discusses the major metalworking industries, including consumption of metalworking fluids and major suppliers, for each of the countries listed below:

- Germany
- France
- Italy
- United Kingdom
- Spain

- Benelux
- Scandinavia
- Other (Switzerland, Austria, Greece, Portugal, Ireland)

5. PRODUCTS

In this section, applications, trends, consumption by end-use industry and country, major suppliers, and volume forecast are examined for the four metalworking fluid categories listed below:

- Removal fluids
- Forming fluids
- Protecting fluids
- Treating fluids

Also provided is an overview of performance additives used in metalworking fluids, including a discussion of health and safety issues, trends, and suppliers.

6. SUPPLIERS

This section provides company profiles for suppliers of metalworking fluids in the Western European market. The profiles address plant locations, ownership, financial performance (including sales by product and markets), and organizational structure and include an assessment of each supplier's metalworking fluids business. In addition, this section includes an overview of recent mergers and acquisitions affecting the Western European metalworking fluids industry.

- Major suppliers
 - Blaser Swissslube
 - BP Castrol
 - Cimcool Industrial Products
 - Croda Application Chemicals Ltd.
 - ExxonMobil Lubricants Europe
 - Fuchs Petrolub AG
 - Houghton Europe BV
 - Petrofer Chemie
 - Quaker Chemical Europe BV
 - Shell Metalworking Europe
 - D.A. Stuart Company
 - TotalFinaElf S.A.
- Minor suppliers
 - Acheson Colloids Company
 - AgipPetroli
 - Aral AG
 - Carl Bechem GmbH
 - ChevronTexaco Lubricants Company
 - Condat S.A.
 - Henkel Surface Technologies
 - Kuwait Petroleum International Lubricants
 - Motul S.A.
 - Oemeta Chemische Werke GmbH
 - Pfinder Chemie KG
 - Repsol-YPF S.A.
 - Rhenus Lub
 - Statoil AB
 - Wynn's France S.A.
 - Zeller & Gmelin GmbH

**BUSINESS OPPORTUNITIES
IN METALWORKING FLUIDS
WESTERN EUROPE 2001**

OVERVIEW

BUSINESS OPPORTUNITIES IN METALWORKING FLUIDS WESTERN EUROPE 2001 is a multi-client report designed specifically to help subscribers identify and capitalize on business prospects in the Western European metalworking fluids market.

The report presents opportunities in a pragmatic and systematic analysis that provides subscribers with a means to identify the ones that best fit their product portfolios, locations, level of funding, corporate strategy, corporate culture, business objectives, and strengths and weaknesses.

Kline's four-dimension opportunities assessment model is the backbone of the analysis. This model has a proven track record in providing subscribers with highly actionable and profitable results. The types of business opportunities examined in each stage of the assessment are listed below:

- Growth opportunities
- Emerging market opportunities
- Alliances and partnerships opportunities (e.g., equipment manufacturers)
- New product development opportunities (e.g. hydroforming fluids)
- Niche opportunities (e.g., high-margin microlubrication fluids)
- Value-added service opportunities (e.g., chemical management)

- Formulation opportunities
- Supply channel opportunities (e.g., Internet)
- Pricing opportunities

The first dimension in the opportunities assessment model examines business opportunities by end-use industry. It is based on interviews with plant managers, purchasing executives, owners, operators, and other influencers and decision-makers in metalworking fluids selection. The end-use industries examined in this stage of the opportunities assessment include:

- Transportation equipment
- Fabricated metal products
- Machinery
- Primary ferrous products
- Primary aluminum
- Metal cans
- Other end-use industries

A second dimension of the assessment model overlays product type on the opportunities examined above. In addition to interviews with end users, this analysis is based on field and phone interviews with metalworking fluid suppliers and additive manufacturers. The product categories examined in this dimension of the analysis include the following:

- Removal fluid (cutting oil/coolants/grinding fluid)
- Forming fluid (rolling oils, drawing and stamping compounds, forging compounds, hydroforming fluids)

- Protecting fluid (temporary corrosion prevention)
- Treating fluid (quenching fluids)

The third dimension of the opportunities assessment model brings the size of the metalworking fluid supplier into the equation. Specifically, this part of the model identifies business opportunities for small, midsize, and large metalworking fluid suppliers.

To underscore the relevance of this dimension, consider how business opportunities differ for large versus small suppliers. A large metalworking fluid supplier may find significant prospects for new business as a result of an automobile manufacturer building a new manufacturing plant in its region.

Although the new plant will represent possibilities for the large supplier, it will likely be a non-event for smaller suppliers, due to chemical management programs and existing supplier relationships. Conversely, a smaller supplier may find business opportunities resulting from the large supplier neglecting small accounts because its resources are being constrained by servicing the new auto manufacturing plant.

The fourth and final dimension of Kline's assessment model in **BUSINESS OPPORTUNITIES IN**

METALWORKING FLUIDS WESTERN EUROPE 2001 is geography. Although Europe is certainly moving toward a more unified community, regulatory issues, commerce, cultures, and other factors present country-specific business opportunities. An analysis of business prospects includes the countries and regions listed below:

- Germany
- France
- United Kingdom
- Italy
- Spain
- Benelux-a
- Scandinavia-b
- Other-c

a- Includes Belgium, Luxembourg, and the Netherlands.

b- Includes Denmark, Finland, Norway, and Sweden.

c- Includes Greece, Ireland, Portugal, and Switzerland.

OBJECTIVE

The objective of **BUSINESS OPPORTUNITIES IN METALWORKING FLUIDS EUROPE 2001** is to provide subscribers with a means to grow their metalworking fluids business in Europe.

THE SCOPE

The geographic scope of the study is Western Europe, as detailed in the Report Contents.

The scope of metalworking fluid products covered in this report includes the following:

- Removal fluids (cutting oil/coolants/grinding fluid)
- Forming fluids (rolling oils, drawing and stamping compounds, forging compounds, hydroforming fluids)
- Treating fluids (quenching fluids)
- Protecting fluids (temporary corrosion prevention)

METHODOLOGY

Kline & Company's approach to providing high-quality market information on the global metalworking fluids business is based on primary research. Although secondary sources such as the Internet and trade publications have been used, the primary methodology employed in this study is telephone and in-person interviews with metalworking fluid marketers, additive and basestock manufacturers, blenders, trade association members, and other industry experts on the supply side.

In addition, the report is also based on demand-side interviews with such consumers of metalworking fluids as job shops, automobile manufacturers, steel and aluminum mills, metal can manufacturers, and others.

All of the interviewing, analysis, and report writing has been conducted by a team of Kline & Company associates with extensive experience in metalworking fluids, market research, and business opportunity assessment.

KLINE GROUP CREDENTIALS

Kline & Company, Inc. is an international business and management consulting firm offering a broad range of services to the petroleum, energy, and related chemical-based industries. Our headquarters are located in Little Falls, NJ, and we currently have representative offices in:

- Brussels, Belgium
- Tokyo, Japan
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Since its inception in 1959, Kline has assisted clients in finding practical solutions to complex business problems and has earned a reputation for delivering high-quality studies and market and technology assessments. We complete approximately 200 proprietary assignments and publish approximately 20 multiclient research reports each year.

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- Business appraisals
- Competitive intelligence
- Customer satisfaction
- Manufacturing economics
- Market analysis
- Mergers and acquisitions
- Strategy development
- Technology assessment

BUSINESS OPPORTUNITIES IN METALWORKING FLUIDS WESTERN EUROPE 2001

is the eighth report in a continuing series of studies on the global metalworking fluids business, and Kline's second report on the metalworking fluids business in Europe. Other metalworking fluids studies published by Kline & Company include:

- PROFILES OF METALWORKING FLUID SUPPLIERS USA 1999
- METALWORKING FLUIDS USA 1998
- METALWORKING FLUIDS ASIA-PACIFIC 1997
- METALWORKING FLUIDS JAPAN 1997
- THE EMERGENCE OF CHEMICAL MANAGEMENT IN METALWORKING INDUSTRIES USA 1996
- METALWORKING FLUIDS EUROPE 1995
- METALWORKING FLUIDS USA 1994

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