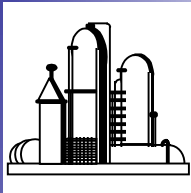


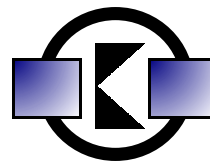
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BUSINESS OPPORTUNITIES IN THE LATIN AMERICAN LUBRICANTS MARKET, 2000



**A comprehensive market analysis of the finished
lubricants business in Latin America, with
a focus on the following countries:**

- **Argentina**
- **Brazil**
- **Chile**
- **Colombia**
- **Mexico**
- **Venezuela**



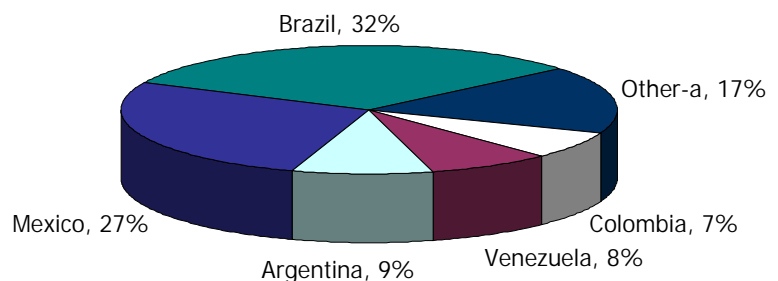
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The lubricants business in Latin America accounts for roughly 765 million gal, valued at nearly \$5.8 billion, in 1999. This represents 22% of market volume for the Americas and 39% of its value. The business is dominated by five countries—Brazil, Mexico, Argentina, Venezuela, and Colombia—which account for nearly 630 million gal, or 82% of total demand, as shown in Figure 1.

Unlike in North America, where industrial lubricants represent the leading market segment by a great margin, the commercial automotive segment is the leader in Latin America. This segment accounts for 37% of the total market and includes heavy-duty diesel engine oil, hydraulic and transmission fluid, gear oil, and grease. The consumer automotive market segment follows at 34% of the total. Industrial lubricants make up the balance at 29%.

Figure 1

ESTIMATED DEMAND FOR LUBRICANTS
IN LATIN AMERICA BY COUNTRY, 1999



a- Includes Chile, Uruguay, Paraguay, Peru, Ecuador, Bolivia, and SICA and CARICOM countries.

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The real story in Latin America, however, is not the volume of lubricants consumed in the region but the emerging business opportunities. **BUSINESS OPPORTUNITIES IN THE LATIN AMERICAN LUBRICANTS MARKET, 2000** provides subscribers with market size and segmentation data as well as insights on business opportunities in the Latin American lubricants market. Specifically, the report offers subscribers with the following benefits:

- **A highly reliable and independent assessment of finished lubricant consumption and supplier market shares**
- **A discussion of business opportunities**
 - Emerging markets
 - New product developments
- **Updates on partnerships, joint ventures, and acquisitions**
- **Accurate and timely competitive intelligence**
- **A detailed assessment of market trends and business developments**

OBJECTIVE

The primary objective of **BUSINESS OPPORTUNITIES IN THE LATIN AMERICAN LUBRICANTS MARKET, 2000** is to provide subscribers with a comprehensive, accurate, and independent appraisal of the size and segmentation of the Latin American lubricants business with insights into the business opportunities in the region.

SCOPE

The geographic scope of the study is Latin America, including Mexico, Central and South America, and the Caribbean community. In addition to providing a consolidated analysis of lubricant supply and demand in the region, this report features sections on the leading countries consuming lubricants in the region, including:

- **Argentina**
- **Brazil**
- **Chile**
- **Colombia**
- **Mexico**
- **Venezuela**

Supply and demand data is provided in both volume and value (U.S.). The base year for market size and segmentation data is 1999.

STUDY CONTENTS

To achieve the objective stated above, **BUSINESS OPPORTUNITIES IN THE LATIN AMERICAN LUBRICANTS MARKET, 2000** provides subscribers with insights and information on products, markets, suppliers, market developments, and business opportunities. The table of contents for the study is shown on the previous page, and key components in the outline are discussed below:

1. **Executive Summary.**
This section provides an executive-style overview of key report findings.

2. **Introduction.**
The introduction supplies background information on the scope, methodology, and abbreviations and acronyms used in the study.

3. **Overall Market.**
This section offers a concentrated view of the finished lubricants business in Latin America. It features data on supply, demand, pricing, channels of distribution, purchasing practices, and market developments, as well as an outlook.

- 4-10. **Country Profiles.**
The country profiles provide details on the lubricants business in the six largest lubricant-consuming countries in Latin America. Specifically, the profiles address the topics and issues listed in Table 1.

11. **Products.**
BUSINESS OPPORTUNITIES IN THE LATIN AMERICAN LUBRICANTS MARKET, 2000 features an in-depth analysis of seven major product categories. In addition, for each main product category, the study offers insights and information on the types and grades of products used, including synthetics. Specifically, this section will address the following topics for each product category analyzed:

- Properties and specifications
- Grades and prices
- Packaging and shipping
- Maintenance
- Applications
- Demand (volume and value) by:
 - Application
 - Country
 - Grade
 - Synthetics
 - Market segment
- Distribution channels
- Major suppliers
- Market developments
- Outlook to 2004
- Business opportunities

12. Supplier Dynamics.

This section examines the intensity of competition among suppliers in the region.

13. Supplier Profiles.

Understanding the competition is fundamental to growing your business. This is particularly critical in Latin America, where the competitive landscape of the lubricants business is changing. The supplier profiles featured in **BUSINESS OPPORTUNITIES IN THE LATIN AMERICAN LUBRICANTS MARKET, 2000**

provide subscribers with an excellent means to sharpen their awareness of the position of suppliers in the marketplace. This knowledge can be a powerful tool in developing a solid strategy to enhance your company's competitive position in Latin America. This section consists of company profiles for lubricant suppliers in the region and addresses the following information:

- Background
- Organizational structure
- Products and services
- Estimated sales
- Channels of distribution
- Marketing regions

Table 1

TOPICS AND ISSUES ADDRESSED IN COUNTRY PROFILES

- Political and economic background
- Barriers to trade
- Vehicle population and manufacturing activity
- Lubricant market segments
 - Commercial automotive
 - Consumer automotive
 - Industrial lubricants

The following is discussed for each of the lubricant market segments:

- Applications
- Performance specifications
- Lubricant demand
 - Viscosity grades
 - Service classifications
 - Synthetic lubricants
- Maintenance practices
- Purchasing practices
- Major suppliers
- Channels of distribution
- Market developments
- Outlook to 2004

14. Outlook.

This section consolidates the findings from the study to create an outlook for the lubricants business in Latin America to the year 2004. Demand forecasts are provided for market segments and products.

15. Business Opportunities.

This section offers important insights into business opportunities in Latin America. It presents the opportunities by country, product, and market segment.

METHODOLOGY

As the leading consultancy in the lubricants industry, Kline & Company developed this study based heavily on primary research (field and telephone interviews) to capture insights and information from a wide range of industry experts. This approach has a proven track record as the most effective and reliable method in analyzing lubricant markets, particularly in developing regions of the world.

Although primary research is the leading source of study data, our analysis is also supplemented by secondary research.

This secondary research includes: (1) a review of suppliers' Web sites, product literature, and price lists; (2) a search of recent trade and technical literature; and (3) an examination of statistical data from government, industry, and trade associations and agencies.

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is available by subscription only. Subscribers receive three copies of the report; alternatively, subscribers may elect to receive the online version of the study, which includes unlimited access for members of their organization via Kline's Web site, as well as one hard copy. Additional copies of the report can also be ordered for a nominal fee.

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Kline's Petroleum and Energy Practice leverages more than 60 years of combined experience in the petroleum, fuel, lubricants, and chemicals industries to assist clients in a wide range of proprietary assignments, including:

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

The company also possesses a substantial database on this industry through the completion of several syndicated studies by the Petroleum and Energy Practice and other Kline business groups during the last decade.

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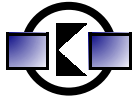
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