

Global Lubricants 2012:

Market Analysis and Assessment

10th Edition

To Be Published 3rd Quarter 2012

Base Year: 2011

Regional Coverage

North America

Latin America

Eastern Europe

Western Europe

Africa/Middle East

Asia-Pacific

A comprehensive assessment of the global markets for finished lubricants and the suppliers that participate in them.

This study is designed to provide business executives with reliable and timely insights that will assist them in:

- Accurately estimating the current size of the global lubricant market by geographic region and product categories
- Analyzing emerging product, performance, promotion, pricing, and channel trends
- Identifying where, when, and how to focus capital expenditures on current and emerging business opportunities
- Identifying barriers to growth and developing strategies to overcome them
- Analyzing the leading companies that are active in the global marketplace and their tactics and strategies
- Evaluating opportunities for mergers, acquisitions, and alliances
- Understanding the impact of the global recession on each of the key lubricant consuming countries

Report Scope

The geographic scope of the study is global; however, the study will analyze the following six regions in detail:

- North America
- Latin America
- Eastern Europe
- Western Europe
- Asia-Pacific
- Africa/Middle East

In addition, the performance of leading players in these six regions will be explicitly analyzed, and profiles for the leading lubricant consuming countries will be provided, as described in the Tentative Table of Contents.

The following products will be analyzed in this study.

- Industrial oils and fluids
 - General industrial oils (hydraulic oils, gear oil, compressor oils, refrigeration oils, turbine oils, other general industrial oils)
 - Metalworking fluids (removal oil, forming oils, treating oils, protecting oils)
 - Industrial engine oils (natural gas engine oils, aviation piston engine oils, marine oils, railroad oils, stationary engine oils)
 - Industrial greases
- Consumer automotive
 - Passenger vehicle engine oil (2T/4T oil)
 - Automatic transmission fluid
 - Gear oil
 - Grease
- Commercial automotive
 - Heavy-duty engine oil
 - Hydraulic and transmission fluid
 - Gear oil
 - Grease

Synthetic, synthetic blend, and conventional lubricants will all be analyzed.

A key element would be evaluating the impact of the global recession on each of the important lubricant consuming countries of the world.

Key Benefits

This program will help senior executives, strategic planners, competitive intelligence trackers, marketers, sales, and other professionals in the finished lubricants business assess the markets for their products and understand their competition on a global basis. It will also be of interest to basestock and additive suppliers who provide raw materials to this industry.

Specifically, this market research study and industry analysis is designed to provide business executives with reliable and timely insights that will assist them in:

- Analyzing the leading companies that are active in the global marketplace and estimating their respective market share
 - For raw material suppliers, analyzing these companies' current and future raw material needs and buying patterns
- Evaluating opportunities for mergers, acquisitions, and alliances
- Accurately estimating the current size of the global lubricant market by geographic region and product
- Predicting demand growth and drivers for each of these geographic regions and products in the future
- Identifying where, when, and how to focus capital expenditures on these current and emerging business opportunities
- Identifying barriers to growth and developing strategies to overcome them
- Understanding the impact of the global recession on each of the key lubricant consuming countries

Tentative Report Contents

1. YEAR IN REVIEW

- Market size drivers and restraints
- Role of OEMs
- Technology and products
- Distribution channels
- Blue-sky-gazing factors (fuel cells, GTL, etc.)
- Mergers, acquisitions, consolidations, and their impact
- Supplier developments and trends
- Regional profiles
 - Size and growth potential
 - Role of OEMs
 - Competitors
 - Market shares
 - Market developments
- Appraisal and opportunities
- FutureView Scenario Forecasts
 - Impact of recession

Subscribers can select a combination of 10 profiles from the supplier and country profiles listed in Tables 1 and 2.

2. SUPPLIER PROFILES

Each supplier profile will contain the following information:

- Background
- Organizational structure
- Financial performance
- Recent developments
- Basestocks
- Additives
- Finished lubricants
- Distribution and marketing
- Appraisal

3. COUNTRY PROFILES

Each country profile will contain the following information:

- Country overview
 - Political and economic background
 - Barriers to trade

- Vehicle population and manufacturing activities
- Basestock manufacturing
- Additives
- Overall lubricant demand
- Commercial automotive lubricants
- Consumer automotive lubricants
- Industrial lubricants

For each of the three lubricant segments, the following will be covered:

- Applications
- Performance specifications
- Demand
- Synthetics
- Maintenance practices
- Purchasing practices
- Major suppliers
- Channels of distribution
- Market developments
- Outlook

Table 1: List of Supplier Profiles for Subscriber Selection

BP	PDVSA
Chevron	PetroChina
CITGO	Petrobras
ConocoPhillips	Petronas
ExxonMobil	Repsol/YPF
Fuchs	Shell
Idemitsu	Sinopec
Indian Oil	Total
LUKOIL	Valvoline
Nippon Oil	Others (please specify)

Table 2: List of Countries for Subscriber Selection

NORTH AMERICA	EASTERN EUROPE	AFRICA/MIDDLE EAST
Canada	Poland	South Africa
Mexico	Russia	Egypt
United States	Hungary	Turkey
LATIN AMERICA	Others (please specify)	Others (please specify)
Argentina	ASIA-PACIFIC	
Brazil	Australia	
Chile	China	
Colombia	India	
Honduras	Indonesia	
Guatemala	Japan	
Peru	Malaysia	
Venezuela	The Philippines	
Others (please specify)	South Korea	
WESTERN EUROPE	Taiwan	
Benelux	Thailand	
France	Vietnam	
Germany/Austria/ Switzerland	Others (please specify)	
Italy		
Spain/Portugal		
United Kingdom		
Others (please specify)		

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 will conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders. 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, 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 over 50 years.

Kline's research and consulting services extend across the entire lubricant 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.

Recently published or in-progress research for the Energy Industry includes:

- Nationalized Oil Companies
- Global Lubricants Industry
- Global Lubricant Basestocks Three-Year Annual Service
- Global Synthetic Lubricants: Market Analysis and Opportunities
- LubesNet Database 2011: Annual Online Subscription
- Opportunities in Lubricants North America
- Metalworking Fluids Global Series
- Global Lubricant Additives
- Global Wax Industry
- Opportunities in Lubricants: China
- Opportunities in Lubricants: India

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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