

# Opportunities in Lubricants North America, 2005-2007

## In Continuous Publication Since 1984

### Market Segment Coverage

**Commercial Automotive**  
Published June 2006  
Base Year 2005

**Consumer Automotive**  
Published July 2007  
Base Year 2006

**Industrial Oils and Fluids**  
Published July 2008  
Base Year 2007

A comprehensive, in-depth analysis of automotive and industrial finished lubricant products, end-use industries/trade classes, major suppliers, and market trends in the United States plus summary coverage of Canada and Mexico. Topics addressed include:

- Size and segmentation of the North American finished lubricants market by country
- Current and future product and service requirements of B2B installers and retailers in the consumer automotive segment
- Similarities and differences in commercial automotive lubricant demand for the on- and off-highway channels
- Specific industrial oil and fluid requirements of 15 major end-use industries representing the core of U.S. industry and manufacturing
- Demand through to the product viscosity grade level for automotive and industrial oils and fluids
- Fundamental information and insights required to pursue product development activities for both conventional and synthetic formulations
- Market shares of the leading lubricant suppliers across the three analyzed segments including B2B trade classes, highway segments, and industries

## Report Scope

*Opportunities in Lubricants North America, 2005-2007* is an in-depth analysis of automotive and industrial lubricant products, markets, and suppliers.

The report series is designed to provide subscribers with an accurate and independent resource to assess and pursue business opportunities in the North American finished 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 series focuses primarily on the U.S. market, with a detailed overview of the Canadian and Mexican markets.

Each annual report in the three-volume series details a specific market segment depending on the base year. The first annual report covered the commercial automotive market segment in 2005, the second report covered the consumer automotive market in 2006, and the third report covered industrial oils and fluids in 2007. Each report includes five-year scenario-based forecasts. In addition, the Year in Review chapter of each report includes a summary update on recent developments in the other two market segments.

## Key Benefits

*Opportunities in Lubricants North America, 2005-2007* 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 North America finished lubricant and functional fluids business.

Specifically, the report assists subscribers by providing:

- A highly reliable and independent assessment of North American conventional and synthetic lubricant demand and supplier market share
- An unbiased assessment of current and future lubricant requirements from the perspective of B2B and industrial end users, as well as perceptions of product and service quality offerings
- An examination of the continuing demand shifts throughout the entire market in critical areas such as viscosity grade, conventional to synthetic formulations, and retail to installed service provider
- A resource tool for sales, marketing, and strategy personnel to quickly learn the fundamentals and lubricant requirements of the leading end-use markets
- Competitive intelligence for use in benchmarking

## Report Contents

### Volume I: Commercial Automotive

#### 1. INTRODUCTION

- Sources and methods
- Organization
- Prices and values
- Units
- Geographic regions
- Limitations
- Acronyms and abbreviations

#### 2. YEAR IN REVIEW

- Overall market summary: North America
- Overall market summary: United States
- Suppliers
- Mergers and acquisitions
- Market developments
- Government regulations
- Outlook

#### 3. OVERALL MARKET: UNITED STATES

- Commercial fleets
- Vehicles
- Products
- Consumption
- Suppliers
- Distribution channels
- Purchasing practices
- Pricing
- Outlook
- Market opportunities

*Kline's FutureView Scenario Forecasting Model for the U.S. Commercial Automotive Lubricants Market*

#### 4. ON-HIGHWAY FLEETS: UNITED STATES

- 4A. For-Hire Trucking
- 4B. Private Fleets
- 4C. State and Local Governments
- 4D. Lease-Rental
- 4E. Transportation

*The following information is provided for each section of Chapter 4:*

- Structure of the industry
- Applications
- Specifications and prices
- Consumption
- Purchasing practices
- Major suppliers
- Channels of distribution
- Market developments
- Outlook
- Appraisal
- Opportunities

#### 5. OFF-HIGHWAY FLEETS: UNITED STATES

- 5A. Agriculture
- 5B. Construction
- 5C. Mining
- 5D. Federal Government

*The following information is provided for each section of Chapter 5:*

- Structure of the industry
- Applications
- Specifications and prices
- Consumption
- Purchasing practices
- Major suppliers
- Channels of distribution
- Market developments
- Outlook
- Appraisal
- Opportunities

#### 6. PRODUCTS: UNITED STATES

- 6A. Engine Oil
- 6B. Hydraulic and Transmission Fluid
- 6C. Gear Oil
- 6D. Grease

*The following information is provided for each section of Chapter 6:*

- Properties and specifications
- Grades and pricing

- Packaging and shipping
- Applications
- Maintenance
- Consumption
- Distribution channels
- Major suppliers
- Market developments
- Outlook
- Appraisal and opportunities

#### 7. LUBRICANTS OVERVIEW: CANADA

#### 8. LUBRICANTS OVERVIEW: MEXICO

*The following information is provided for Chapters 7 and 8:*

- Political and economic background
- Vehicle population and manufacturing activities
- Basestock refineries
- Lubricant market segments
- Market developments
- Outlook
- Appraisal and opportunities

#### 9. SUPPLIERS: NORTH AMERICA

- 9A. BP
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  - Cenex Lubricants
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#### 10. Market Opportunities in the U.S. Commercial Automotive Lubricant Market, 2005-2010

## Volume II: Consumer Automotive

### 1. INTRODUCTION

- Sources and methods
- Organization
- Prices and values
- Units
- Geographic regions
- Limitations
- Acronyms and abbreviations

### 2. YEAR IN REVIEW

- Overall market summary: North America
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- Suppliers
- Mergers and acquisitions
- Market developments
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### 3. CONSUMER AUTOMOTIVE LUBRICANT MARKET: UNITED STATES

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- Consumption
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- Purchasing practices
- Prices
- Market developments
- Outlook
- Appraisal and opportunities
- Scenarios for Motor Oil Consumption Using

*Kline's FutureView Analytical Forecasting Tool*

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- 3B1. Mass Merchandisers
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- 3C1. Quick Lube Centers
- 3C2. New Car Dealers
- 3C3. General Repair Garages
- 3C4. Gas Stations
- 3C5. Other Installed Service Providers

*The following information is provided for each subsection under sections 3B and 3C:*

- Structure of the industry
- Lubricants business
- Sales
- Brands
- Packaging
- Channels of distribution
- Brand decisions
- Marketing
- Pricing
- Market trends
- Outlook
- Appraisal and opportunities

### 4. CONSUMER AUTOMOTIVE LUBRICANT PRODUCTS: UNITED STATES

- 4A. Engine Oil
- 4B. Automatic Transmission Fluid
- 4C. Gear Oil
- 4D. Grease

*The following information is provided for each section under Chapter 4:*

- Product overview
- Properties and specifications
- Grades and prices
- Packaging and shipping
- Applications
- Maintenance
- Consumption
- Major customers
- Major suppliers
- Market developments
- Outlook

### 5. LUBRICANTS OVERVIEW: CANADA

### 6. LUBRICANTS OVERVIEW: MEXICO

*The following information is provided for Chapters 5 and 6:*

- Political and economic background
- Vehicle population and manufacturing activities
- Basestock refineries
- Lubricant market segments
- Market developments
- Outlook
- Appraisal and opportunities

### 7. LUBRICANT SUPPLIER PROFILES: NORTH AMERICA

- 7A. BP
- 7B. Chevron

- 7C. CITGO
- 7D. ConocoPhillips
- 7E. ExxonMobil
- 7F. Petro-Canada
- 7G. Shell
- 7H. Valvoline

*The following information is provided for each supplier profiled in Chapter 7:*

- Background
- Organizational structure
- Recent developments
- Lubricants business overview
- Lubricants manufacturing
- Sales
- Market share: United States
- Distribution
- Consumer automotive lubricants

### 8. QUICK LUBE CENTER PROFILES: UNITED STATES

*The following information is provided for each company profiled in Chapter 8:*

- Sales and financial performance
- Facilities
- Products and grades
- Advertising and promotion
- Appraisal

### 9. NEW CAR DEALER PROFILES: UNITED STATES

*The following information is provided for each company profiled in Chapter 8:*

- Sales and financial performance
- Stores/facilities
- Products and grades
- Advertising and promotion
- Appraisal

### 10. MARKET OPPORTUNITIES

APPENDIX: Additional Information about Surveyed Retail Outlets

*The following information is provided in the Appendix:*

- Mass merchandisers
- Auto parts stores
- Quick lube centers
- New car dealers
- General repair garages
- Gas stations
- Other installers
- Other retailers

## Volume III: Industrial Oils and Fluids

### 1. INTRODUCTION

- Sources and methods
- Organization
- Prices and values
- Units
- Geographic regions
- Limitations
- Acronyms and abbreviations

### 2. YEAR IN REVIEW

- Overall market summary: North America
- Overall market summary: United States
- Suppliers
- Mergers, acquisitions, and supplier developments
- Market developments
- Outlook

### 3. OVERALL MARKET: UNITED STATES

- Introduction
- Industrial oils and fluids
- Prices
- Consumption
- Major suppliers
- Channels of distribution
- Purchasing practices
- Historical perspective

*Kline's FutureView Analytical Forecasting Tool*

### 4. END-USE INDUSTRIES: UNITED STATES

- 4A. Rubber and Plastics Products
- 4B. Transportation Equipment
- 4C. Chemicals and Allied Products
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- 4F. Primary Metals Manufacturing
- 4G. Printing
- 4H. Fabricated Metal Products
- 4I. Mining
- 4J. Food Processing
- 4K. Wood and Paper Products
- 4L. Agriculture, Forestry, and Fishing

### 4M. Oil and Gas Extraction and Petroleum Refining

### 4N. Machinery

### 4O. Textiles

### 4P. Other End-Use Industries

*The following information is provided for each section under Chapter 4:*

- Introduction
- Structure of the industry
- Lubricant applications
- Specifications and pricing
- Consumption
- Major customers
- Major suppliers
- Channels of distribution
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- Outlook
- Appraisal
- Opportunities

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### 5C. Turbine and Circulating Oils

### 5D. Gear Oils

### 5E. Compressor and Refrigeration Oils

### 5F. Removal Fluids

### 5G. Forming Fluids

### 5H. Protecting Fluids

### 5I. Treating Fluids

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*The following information is provided for each section under Chapter 5:*

- Introduction
- Functions
- Oil varieties and performance requirements
- Applications
- Prices
- Consumption
- Historical perspective
- Major suppliers
- Channels of distribution
- Market developments
- Outlook
- Opportunities

### 6. LUBRICANTS OVERVIEW: CANADA

### 7. LUBRICANTS OVERVIEW: MEXICO

*The following information is provided for Chapters 6 and 7:*

- Political and economic background
- Barriers to trade
- Vehicle population
- Basestock refineries
- Lubricant market segments
- Market developments
- Outlook
- Appraisal and opportunities

### 8. SUPPLIERS : NORTH AMERICA

### 8A. BP

### 8B. Chevron

### 8C. CITGO

### 8D. ConocoPhillips

### 8E. ExxonMobil

### 8F. Quaker Chemical Corporation

### 8G. Royal Dutch Shell

### 8H. Valvoline

*The following information is provided for each profile in Chapter 8:*

- Background
- Financial performance
- Organizational structure
- Lubricants business overview
- New products and recent developments: 2007 and 2008
- Industrial oils and fluids

## 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 conducted 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 B2B end users, and other direct influencers on brand and supplier purchase decisions. This approach proved to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents 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. The analysis was completed by a team of experienced professionals from Kline's Energy practice.

## 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](mailto:sales@klinegroup.com), visit our website at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below.

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- Global Lubricant Basestocks Three-Year Annual Service
- Global Synthetic Lubricants 2008: Market Analysis and Opportunities
- LubesNet Database 2008: Annual Online Subscription
- Opportunities in Lubricants North America, 2005-2007
- Metalworking Fluids 2008 Global Series
- Competitive Intelligence for the Global Lubricants Industry, 2007-2017
- The Chinese Lubricants Market
- Global Lubricant Additives

# Opportunities in Lubricants North America, 2005-2007

## Ordering Information & Contract

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Volume	Standard price	Amount (please fill in amount)
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Volume II: Consumer Automotive (Y59v)	47,500	
Volume III: Industrial Oils and Fluids (Y59w)	50,000	
NOTE: All prices in U.S. funds.	Subtotal	
	NJ only: 7% sales tax	
	<b>TOTAL</b>	

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