

# Opportunities in Lubricants, 2008-2010: North American Market Analysis

## In Continuous Publication Since 1984

### Market Segment Coverage

**Commercial Automotive:**

Published June 2009

Base Year 2008

**Consumer Automotive:**

Published June 2010

Base Year 2009

**Industrial Oils and Fluids:**

To be Published 2nd Quarter 2011

Base Year 2010

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 North American industry and manufacturing
- Demand through to the product viscosity grade level for automotive and industrial oils and fluids
- Market shares of the leading lubricant suppliers across the three analyzed segments, including B2B trade classes, highway segments, and industries

New and enhanced features for this edition include:

- All data tables in the published report will be provided in an Excel database format to support internal analysis and "what if" scenarios based on your own perspective and assessment of current and future market conditions.

## Report Scope

*Opportunities in Lubricants 2008-2010: North American Market Analysis* 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 will cover the commercial automotive market segment in 2008, the second report will cover the consumer automotive market in 2009, and the third report will cover industrial oils and fluids in 2010. Each report will include five-year scenario-based forecasts. In addition, the Year in Review chapter of each report will include a summary update on recent developments in the other two market segments.

## Key Benefits

*Opportunities in Lubricants 2008-2010: North American Market Analysis* 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, commercial, 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

# Opportunities in Lubricants, 2008-2010: North American Market Analysis

## Report Contents

### 1. INTRODUCTION

### 2. YEAR IN REVIEW

The following finished lubricant demand information in volume and value is provided for all three market segments for each of the three base years under analysis:

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

### 3. OVERALL MARKET: UNITED STATES

This chapter serves as the executive summary of the report and will include the following finished lubricant demand information in volume and value for the market segment under analysis for that base year:

- Introduction
- Product descriptions and prices
- Base year consumption by product and industry/trade class
- Synthetics
- Region
- Major supplier and product category
- Packaging and distribution channels
- Purchasing practices
- Historical perspective
- FutureView Analytical Forecasting Model

### 4. END-USE INDUSTRIES AND TRADE CLASSES: UNITED STATES

Perhaps the most frequently consulted section in *Opportunities in Lubricants*, this group of chapters will provide details on supply, demand, opportunities, and market developments on the specific end-use industries or trade classes listed in Table 1.

In addition to detailing lubricant demand by industry or trade class and supplier, these chapters include market trends, end-user perceptions about suppliers, detail on major customers, a five-year forecast and outlook, and critical analysis of business opportunities specific to the industry or trade class under analysis for that base year.

### 5. PRODUCTS: UNITED STATES

The following information will be provided for each product category listed in Table 2:

- Product overview including properties, functions, and specifications
- Applications
- Packaging
- Grades and prices
- Maintenance
- Consumption
- Distribution channels
- Major suppliers
- Market developments
- Outlook
- Appraisal and opportunities

### 6. LUBRICANTS OVERVIEW: CANADA

### 7. LUBRICANTS OVERVIEW: MEXICO

Chapters 6 and 7 will feature an overview of each country market, including:

- Key economic, political, and demographic indicators
- Lubricant basestock refineries
- Demand by market segment, product category and type, and viscosity grade
- Supplier market shares
- Market developments
- Outlook
- Appraisal and opportunities

### 8. SUPPLIERS: NORTH AMERICA

The following information will be provided for each of the leading North American finished lubricant manufacturers listed in Table 3:

- Background and financial overview
- Organizational structure
- New products and recent developments
- Lubricants business overview
- Lubricants manufacturing
- Sales
- U.S. market share
- Sales and additional detail

### 9. MARKET OPPORTUNITIES: BASE PLUS 5 YEARS

Produced as a PowerPoint slide deck suitable for your internal client meetings or for sales and distributor channel meetings, this chapter provides market segment demand data by trade class or end-use industry, product type, and major supplier. A growth driver section summarizes leading indicators that will positively and negatively influence demand for the next five years. A historical demand view is also provided for additional perspective.

# Opportunities in Lubricants, 2008-2010: North American Market Analysis

**Table 1: Trade Classes and End-Use Industries Covered in the Report Series**

Consumer automotive		Commercial automotive		Industrial	
Installed	Retail	On-highway	Off-highway	End-use industries	
<ul style="list-style-type: none"> <li>■ Quick lube centers</li> <li>■ New car dealerships</li> <li>■ Tire, brake, and muffler shops</li> <li>■ General repair garages</li> <li>■ Other installed service providers</li> </ul>	<ul style="list-style-type: none"> <li>■ Mass merchandisers</li> <li>■ Auto parts stores</li> <li>■ Other retail outlets</li> </ul>	<ul style="list-style-type: none"> <li>■ For-hire trucking</li> <li>■ Private fleets</li> <li>■ State and local governments</li> <li>■ Lease-rental</li> <li>■ Transportation</li> </ul>	<ul style="list-style-type: none"> <li>■ Agriculture</li> <li>■ Construction</li> <li>■ Mining</li> <li>■ Federal government</li> </ul>	<ul style="list-style-type: none"> <li>■ Rubber and plastic products</li> <li>■ Transportation equipment</li> <li>■ Chemicals and allied products</li> <li>■ Electrical equipment and energy transmission</li> <li>■ Off-highway transportation</li> <li>■ Primary metals manufacturing</li> <li>■ Printing</li> <li>■ Fabricated metal products</li> </ul>	<ul style="list-style-type: none"> <li>■ Mining</li> <li>■ Food processing</li> <li>■ Wood and paper products</li> <li>■ Agriculture, forestry, and fishing</li> <li>■ Oils and gas extraction and petroleum refining</li> <li>■ Machinery</li> <li>■ Textiles</li> <li>■ Other end-use industries</li> </ul>

**Table 2: Lubricant Products Covered in the Report Series**

Consumer automotive	Commercial automotive	Industrial
<ul style="list-style-type: none"> <li>■ Passenger car motor oil</li> <li>■ Automatic transmission fluid</li> <li>■ Gear oil</li> <li>■ Grease</li> <li>■ Two/four-stroke engine oil</li> </ul>	<ul style="list-style-type: none"> <li>■ Heavy-duty engine oil</li> <li>■ Hydraulic and transmission fluid</li> <li>■ Gear oil</li> <li>■ Grease</li> </ul>	<ul style="list-style-type: none"> <li>■ Process oil-a</li> <li>■ General industrial oil-b</li> <li>■ Metalworking fluids-c</li> <li>■ Industrial engine oil-d</li> <li>■ Grease</li> </ul>
<p>a- Includes aromatic, electrical, rubber, white, and other paraffinic, naphthenic, and synthetic oils.                      b- Includes hydraulic, turbine and circulating, gear, compressor and refrigeration, and other industrial oils.                      c- Includes removal, forming, protecting, and treating fluids.                      d- Includes marine, railroad, natural gas, and aviation engine oils.</p>		

**Table 3: Finished Lubricant Manufacturers Profiled in the Report Series**

Supplier	Consumer automotive	Commercial automotive	Industrial
BPCastrol	X	X	X
Chevron	X	X	X
CITGO	X	X	X
ConocoPhillips	X	X	X
ExxonMobil	X	X	X
Quaker Chemical			X
Royal Dutch Shell	X	X	X
Valvoline	X	X	X
Others-a	X	X	X

a- Commercial Automotive only: Caterpillar Inc., CHS Inc., Cummins Engine Company Inc., Deere & Company, Mack Trucks Inc.  
 Consumer Automotive only: top U.S. quick lube operators, top U.S. new car dealerships.

# Opportunities in Lubricants, 2008-2010: North American Market Analysis

## 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 conduct 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 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. The analysis will be 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 over 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.

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- Global Synthetic Lubricants 2010: Market Analysis and Opportunities
- LubesNet Database 2011: Annual Online Subscription
- Opportunities in Lubricants North America, 2005-2007
- Metalworking Fluids 2010 Global Series
- Competitive Intelligence for the Global Lubricants Industry, 2008-2018
- The Chinese Lubricants Market
- Global Lubricant Additives

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