

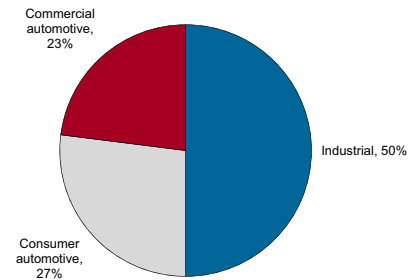
# Opportunities in Lubricants, 2008-2010: North American Market Analysis

## Volume III: Industrial Oils and Fluids

### Fact Sheet

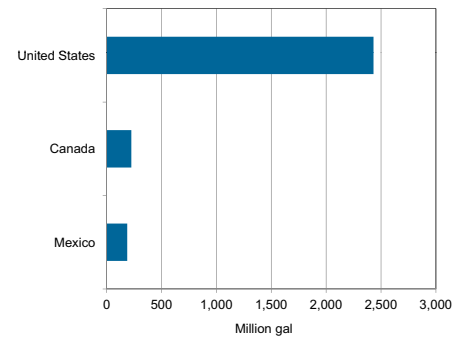
#### The Market

The North American lubricants industry encompasses a wide range of products used in the consumer and commercial automotive lubricants segments, as well as in the industrial lubricants segment. Total consumption of automotive and industrial lubricants in North America in 2010 is estimated at 2,844.0 million gal, valued at Kline's estimate of \$23,537.3 million.



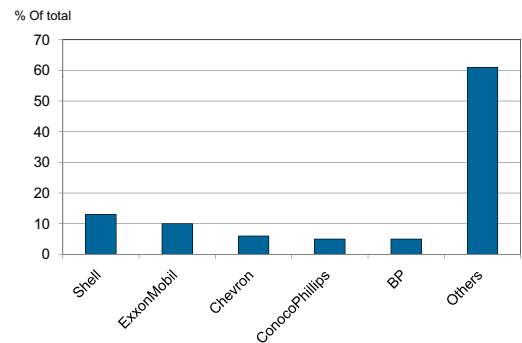
#### Consumption by Country

Lubricant sales in the United States account for 85% of the sales in the North American market by volume, followed by Canada and Mexico.



#### Major Suppliers

Shell is the leading supplier of lubricants in North America in 2010, followed by ExxonMobil, Chevron, and BP.



#### Future Outlook

Consumption of lubricants in North America, based on the most likely scenario, is forecast to reach 3,072.7 million gal in 2015, up from 2,844.0 million gal in 2010. This represents a compound annual growth rate in volume of 1.6%.

