

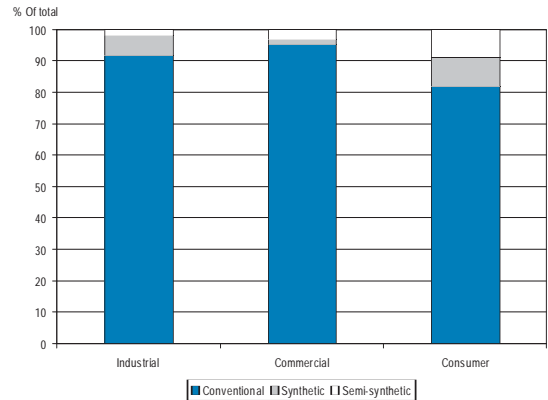
Global Synthetic Lubricants 2008: Market Analysis and Opportunities

2008 Fact Sheet

The Market

The total global demand for finished lubricants, which includes products formulated with conventional and synthetic basestocks and marketed as synthetic and semi-synthetic lubricants, is estimated at 39,271.9 kilotonnes in 2007. At the regional level, Asia-Pacific is the largest finished lubricant consuming region, followed by North America.

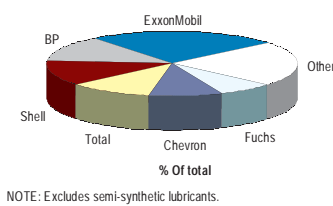
Estimated Global Demand for Finished Lubricants by Market Segment and Type, 2007



Companies

ExxonMobil is the leading global supplier of synthetic finished lubricants, accounting for almost a quarter of the global synthetic lubricant demand. In the industrial oils and fluids market segment, ExxonMobil, Shell, and Fuchs are the top three suppliers with 26.0%, 12.0%, and 10.0% global market share. In the consumer automotive market segment, ExxonMobil, by virtue of its Mobil 1 brand, is by far the dominant supplier.

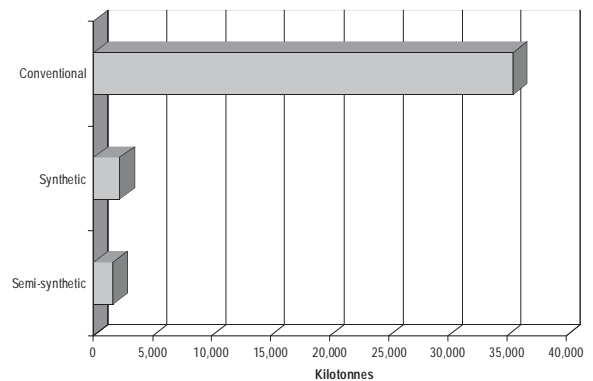
Estimated Share of the Global Synthetic Lubricant Market by Supplier, 2007



Demand

Synthetic lubricant demand is 5.6% of the total, followed by semi-synthetic lubricants. Conventional lubricants contribute the lion's share of the total.

Estimated Share of the Global Synthetic Lubricant Market by Supplier, 2007



Future Outlook

The most likely scenario for global finished lubricant demand estimates a total of 43,345.7 kilotonnes by 2012, up from 39,271.9 kilotonnes in 2007, which represents a CAGR of 2.0%. Conventional lubricants account for 88.9% of the total, with synthetics at 6.8% and semi-synthetics at 4.3%.

Forecasts for the Global Finished Lubricants Market by Lubricant Segment

