

# Metalworking Fluids 2008

## Global Series:

### Market Analysis and Opportunities

#### 2nd Edition

**Published 4th Quarter 2008**

**Base Year: 2007**

#### Regional Coverage

North America

Europe

Asia Pacific

This analysis will provide metalworking fluid formulators, additive suppliers, and end users with the latest information on products, services, applications, and trends, specifically addressing:

- The size and segmentation of the global metalworking fluids industry broken out by region and leading end use
- How economic and political forces are reshaping the worldwide dynamics of supply and demand
- How lower trade barriers and relocation of production facilities are affecting regional market growth
- The market implications of current and future industry regulations
- Market trends and business developments
- Valuable competitive intelligence through in-depth supplier profiles
- Formulation technology changes, options, and opportunities

### Report Scope

Globalization is fueling an unprecedented shift in demand between—as well as within—the three leading metalworking fluids consuming regions of the world: North America, Europe, and Asia-Pacific. The market is also being reshaped by health and environmental issues, technological factors, consolidation of the supplier and consumer bases, and a shift from a product orientation to a service orientation.

*Metalworking Fluids 2008 Global Series: Market Analysis and Opportunities* provides an accurate and independent appraisal of market size and segmentation, key end-use segments and trends, business opportunities, and competitive forces in the global metalworking fluids business. A five-year forecast is also included.

The study is global in scope and organized by the following major geographic regions:

- North America: primarily the United States, Canada, and Mexico
- Europe: including Western and Eastern Europe
  - The Western Europe section includes Germany, France, United Kingdom, Italy, and Spain, plus summary coverage of other selected countries.
  - The Eastern Europe section covers Russia, Ukraine, Poland, the Czech Republic, Romania, and Hungary, plus summary coverage of other selected countries.
- Asia Pacific: Japan, China, South Korea, India, and Taiwan, plus a brief discussion of other selected countries

The final list of countries included in each volume is decided in consultation with charter subscribers.

Metalworking fluid product categories covered for each region are:

- Removal fluid (coolants, cutting oils, grinding fluids)
- Forming fluid (rolling oils, drawing and stamping compounds, forging fluids, and hydroforming fluids)
- Protecting fluid (temporary rust preventatives)
- Treating fluid (quenching and tempering fluids)

### Key Benefits

This report serves as an excellent resource for manufacturers and marketers of metalworking fluids and additive suppliers to build solid strategic plans and respond to competitive forces, emerging technologies, and evolving market needs.

Specifically, this report assists subscribers by providing:

- A highly reliable and independent assessment of global metalworking fluids consumption and market shares
- A cost-effective extension of subscribers' own intelligence development capabilities
- An examination of new business opportunities in established and emerging markets for metalworking fluids
- An update on new product developments and new channels
- An unbiased appraisal of market trends and emerging applications
- Competitive intelligence for use in benchmarking
- A resource for screening potential merger and acquisition candidates

### Contents for Each Regional Report

#### 1. INTRODUCTION

*Background information on the scope, methodology, and terminology used in the report.*

#### 2. EXECUTIVE SUMMARY

*A concise overview of key regional report findings and market developments.*

#### 3. END-USE INDUSTRIES

- Fabricated metal products
- Machinery
- Metal cans
- Primary aluminum products
- Primary ferrous products
- Transportation equipment
- Other end use industries

*For each of the leading end-use industries consuming metalworking fluids, the following details are provided:*

- Structure of the industry
- Applications of metalworking fluids
- Specifications and prices
- Metalworking fluid consumption
  - By product category
  - By country
- Historical perspective
- Major customers and comments
- Purchasing practices
- Major suppliers
- Channels of distribution
- Market developments
- Outlook
- Appraisal and opportunities

#### 4. COUNTRIES

*For each of the countries covered in the Report Scope, the following details are provided:*

- Country characteristics
- Macroeconomics (including business practices and labor information)
- Metalworking fluids overview (including consumption, health and environment, purchasing practices, pricing, distribution, packaging, and customer service)
- Leading end-use industries (including industry statistics, metalworking fluids consumption, and customer comments)
- Metalworking fluid suppliers
- Outlook
- Appraisal and opportunities

#### 5. PRODUCTS

- Removal fluid
- Forming fluid
- Protecting fluid
- Treating fluid

*This section discusses applications, specifications and prices, demand, suppliers, channels of distribution, additives, forecast demand, trends, and opportunities. The products are further broken down by oil based, water soluble, semi-synthetic, and synthetic types.*

#### 6. SUPPLIER PROFILES

- Major suppliers (top ten metalworking fluid suppliers)
- Minor suppliers (other metalworking fluid suppliers)

*Profiles include such detail as locations, ownership, financials, organizational structure, and Kline's assessment of the supplier's business.*

#### APPENDIX: List of Companies Interviewed

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## Market Analysis and Opportunities

### 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 from our Petroleum & Energy practice conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including metalworking fluid manufacturers and marketers, additive and basestock manufacturers, trade associations, and other industry experts on the supply side.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Demand-side primary research focuses on interviews with equipment operators on the shop floor, operations and plant managers, purchasing managers, OEMs, regulatory agencies and others who have a direct influence on what brand and supplier gets the business and why they keep it or lose it.

Primary research represents the bulk of our research efforts. In addition, this analysis is supplemented by secondary research drawn from the review of suppliers' product literature and price lists; 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 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 Web site at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below.

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#### India

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

- Global Synthetic Lubricants, 2007-2017
- Opportunities in Lubricants North America, 2005-2007
- Global Lubricant Basestocks, 2006-2008
- Competitive Intelligence for the Global Lubricants Industry
- LubesNet Global Lubricant Database
- Global Business Opportunities in the Lubricant Basestocks Industry, 2004-2020
- Global Opportunities in the Petroleum Wax Business 2007

# Metalworking Fluids 2008 Global Series:

## Market Analysis and Opportunities

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