

# Metalworking Fluids 2010 Global Series:

## Market Analysis and Opportunities

### Third edition of the global series to be published in three parts

#### Regional Coverage

##### Americas:

To Be Published 1st Quarter  
2011  
Base Year: 2010

##### Europe:

To Be Published 1st Quarter  
2011  
Base Year: 2010

##### Asia-Pacific:

To Be Published 1st Quarter  
2011  
Base Year: 2010

Kline has launched a comprehensive study of the global metalworking fluids industry to understand the lasting impact of the recession on this industry in terms of size, regions, product, technology, and market trends, and "post-recession" growth. This analysis will provide metalworking fluid formulators, marketers, 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 type in 2010 and forecasted out to 2015
- 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
- How trends in the global additives and paraffinic, naphthenics and synthetic basestocks market are impacting the availability of metalworking fluids
- Market trends and business developments
- How current and future industry regulations are affecting the market
- Formulation technology changes, options, and opportunities
- Valuable competitive intelligence through in-depth supplier profiles

Includes access to Kline's *FutureView Scenario Forecasting Model*

## Report Scope

*Metalworking Fluids 2010 Global Series: Market Analysis and Opportunities* will provide 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.

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

- Americas: the United States, Canada, Mexico, and Brazil, plus a brief discussion of other selected countries.
- Europe covering both Western and Eastern Europe will include: Germany, France, United Kingdom, Italy, Turkey, Spain, Russia, Ukraine, Poland, the Czech Republic, Romania, and Hungary, plus summary coverage of other selected countries.
- Asia-Pacific: Japan, China, South Korea, India, Thailand, and Taiwan, plus a brief discussion of other selected countries.

The final list of countries to be included in each volume will be 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)
  - Treating fluid (quenching and tempering fluids)
  - Protecting fluid (temporary rust preventatives)

Types of metalworking fluids that will be covered include oil-based, water-based, semi-synthetic, and synthetic.

## Key Benefits

This report will serve as an excellent resource for manufacturers and marketers of metalworking fluids to build solid strategic plans and respond to competitive forces, emerging technologies, and evolving market needs. Specifically, this report will assist subscribers by providing:

- A highly reliable and independent assessment of global metalworking fluid 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

Subscribers to the study will have unlimited access to Kline's proprietary FutureView Scenario Forecasting Model providing forecasts of the future size of the global metalworking fluids market, broken down by market, region, product, and end use segments. Subscribers can run numerous "what if" scenarios by making changes to demand forecast assumptions.

### Tentative 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 will be 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 will be 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 will discuss applications, specifications and prices, demand, suppliers, channels of distribution, additives, forecast demand, trends, and opportunities. The products will be 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 will include such detail as locations, ownership, financials, organizational structure, and Kline's assessment of the supplier's business.*

#### APPENDIX: List of Companies Interviewed

# Metalworking Fluids 2010 Global Series: 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 Energy practice will conduct 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, blenders, trade associations, and other industry experts on the supply side.

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

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

Although primary research will be by far the leading source of information and insights provided in this study, our analysis will be supplemented by secondary research, including a review of suppliers' product literature and price lists, a search of recent trade and technical literature, and an 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 over 50 years.

Kline's research and consulting services extend across the entire personal care 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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### Recently published or in-progress research for the Energy Industry includes:

- Opportunities in Lubricants 2008-2010: North America Market Analysis
- Opportunities in Lubricants 2009: China Market Analysis
- Opportunities in Lubricants 2010: India Market Analysis
- Global Lubricants Market Analysis and Assessment
- Global Marine Engine Oil Suppliers 2008: Customer Value Added Analysis
- Global Lubricant Basestocks, 2009
- Lubricant Basestocks in Africa and the Middle East, 2010: Market Analysis and Opportunities
- Global Used Oil 2009: Market Analysis and Opportunities
- Global Lubricant Additives 2008: Market Analysis and Opportunities
- Global Synthetic Lubricants 2010: Market Analysis and Opportunities