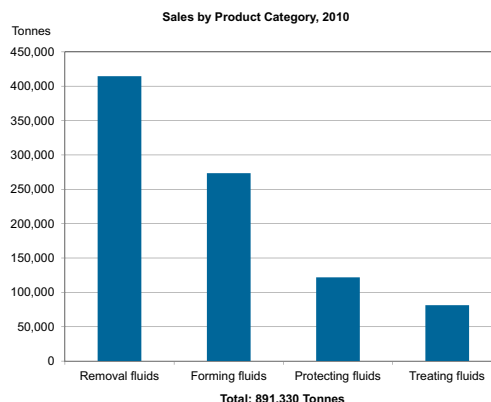


# Metalworking Fluids Global Series 2010: Asia-Pacific Market Analysis and Opportunities

## Fact Sheet

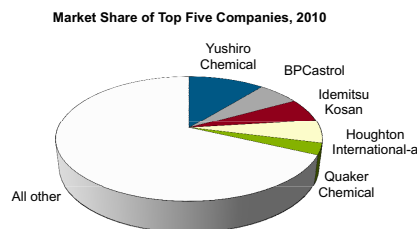
### The Market

Total consumption of metalworking fluids in the Asia-Pacific region is estimated at 891,330 tonnes, valued at USD 3,160 million in 2010. Removal fluids represent the largest category with just under 50% of the total market.



### Companies

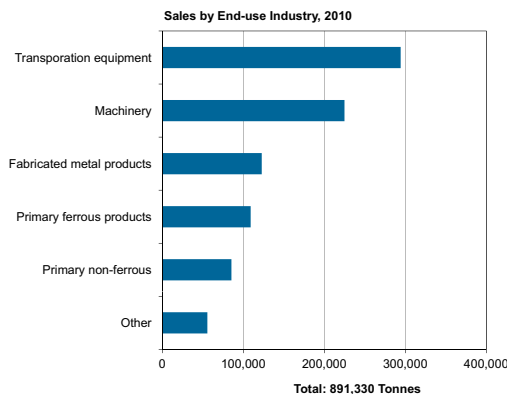
The 25 major suppliers profiled in this study (including some subsidiaries) account for nearly two-thirds of the total supply. Yushiro Chemical is the only supplier of metalworking fluids with a market share above 10% in the Asia-Pacific region, if the sales of its joint ventures are included. This indicates that the regional market is still highly fragmented. However, this is not necessarily the case for individual countries in the region. The leading supplier in a country often has a considerable market share. The leading supplier in many of the Asia-Pacific countries is a domestic company. This is particularly the case in the countries consuming the largest metalworking fluid volumes.



a- Houghton International market share does not include Shell Metalworking Fluid business as this acquisition was not completed in 2010.

### End-use Industry

The transportation equipment sector is the major market for metalworking fluids in the Asia-Pacific region, followed by the machinery sector. It is difficult, however, to classify users of metalworking fluids because companies often engage in activities that could put them in multiple end-use industries. Estimates of metalworking fluid consumption by these industries should therefore be viewed more as giving an idea of size rather than as stating exact levels. Estimated supply of metalworking fluids to these industries largely depends on how suppliers of metalworking fluids classify their customers.



### Outlook

The growth rate for metalworking fluids in the Asia-Pacific region is expected to be around 5%, with China showing the highest growth rate. Consumption of metalworking fluids in the Asia-Pacific region is expected to exceed 1 million tonnes by 2015. The economic growth experienced by the region over the last 10 years was interrupted due to the recession; however, the region is back on track, with both China and India experiencing strong growth.

