

# Global Lubricant Additives 2010:

## Market Analysis and Opportunities

### 2nd Edition

**Published June 2011**

**Base Year: 2010**

#### Regional Coverage

North America

South America

Western Europe

Asia-Pacific

Rest of World (covers  
Eastern Europe, Africa, and  
the Middle East)

A comprehensive analysis of the global market for lubricant additives, focusing on estimated consumption by function class and additive type, key trends, market developments, challenges, and business opportunities and addressing such questions as:

- What is the size of the global lubricant additives market?
  - By product type
  - By function class
- How does this differ from region to region?
- What are the growth prospects for each product type by function class?
- Who are the leading additive suppliers?
- What regulations, if any, are affecting the market?
- Where are the opportunities for marketers of lubricant additives?

# Global Lubricant Additives 2010: Market Analysis and Opportunities

## Report Scope

The study provides an in-depth analysis of lubricant additive consumption in 21 **end-use applications**, including those in the automotive, metalworking, industrial engine, and general industrial sectors. Each end-use application chapter includes a concise analysis of additive function classes, formulations, treat rates, and other critical factors related to additive consumption and purchasing practices.

The end-use application chapters also includes an analysis of future trends and business opportunities. The business opportunities analysis will be particularly valuable for marketers seeking to identify niches to match their core competencies and grow their business.

The **additive function class** section of the report will examine additive consumption by function class. This includes viscosity index improvers, detergents, dispersants, antioxidants, extreme-pressure additives, and pour-point depressants, among others. As with the end-use application section of the study, market size and segmentation information represents only part of the section's value. This section is also designed to provide subscribers with insights into business opportunities.

Understanding the competition is basic to growing your business. This is particularly critical in the lubricants additives business, in which sales are concentrated among few suppliers and competition is very intense. The study provides subscribers with competitive intelligence via **supplier profiles** for the key players in the finished lubricant, as well as additive arenas. It includes information and insights that enable subscribers to exploit business opportunities by understanding product developments, competitive forces, raw material formulation platforms, and future trends.

## Key Benefits

This study is of particular value to additive suppliers and finished lubricant formulators and marketers as the industry moves to optimize additive packages and treat rates with higher-performance basestocks such as API Group II, II+ and III. The advent of the first commercially available gas-to-liquid basestocks in this timeframe will also be of a particular interest to industry participants as will the impact of newer industry specifications.

To identify the opportunities in this growing and rapidly changing market, lubricant additive marketers should fully understand the companies that participate in it. For many marketers, there are acquisition opportunities to examine. For lubricant additive marketers, this report provides an understanding of their customers and the formulations they use. For finished lubricant marketers, this report provides an understanding of the strengths and positioning of their key suppliers.

The report enables subscribers to:

Assess the global market for lubricant additives by product type and function

- Estimate the global market for finished lubricants
- Identify potential alliances, acquisition candidates, and/or customers
- Augment business plans with reliable insights and data

The study also includes access to **Kline's proprietary lubricant additives demand model**. The model estimates lubricant additive consumption by functional type and chemical class by major finished lubricant categories. This is a very powerful interactive tool that helps clients understand Kline's assumptions and run numerous "what if" scenarios.

## Report Contents

1. **INTRODUCTION**
2. **EXECUTIVE SUMMARY**
3. **AUTOMOTIVE LUBRICANT ADDITIVES**
  - Automatic transmission fluid
  - Automotive gear oil
  - Heavy-duty motor oil
  - Passenger car motor oil
  - Tractor hydraulic fluid
  - Two-cycle engine oil
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  - Protecting fluid
  - Removal fluid
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5. **INDUSTRIAL ENGINE OIL ADDITIVES**
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  - Natural gas engine oil
  - Railroad engine oil
  - Other industrial engine oil
6. **GENERAL INDUSTRIAL LUBRICANT ADDITIVES**
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  - Hydraulic fluid
  - Industrial gear oil
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  - Other general industrial oil
7. **GREASE ADDITIVES**
8. **PROCESS OIL**
9. **ADDITIVE FUNCTION CLASSES**
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  - Corrosion inhibitors
  - Detergents
  - Dispersants
  - Emulsifiers
  - Extreme-pressure/antiwear/antiseize additives
  - Friction modifiers
  - Pour-point depressants
  - Viscosity index improvers
  - Others
10. **SUPPLIERS**

*A list of suppliers profiled is provided in Table 1.*

**Table 1: List of Companies Profiled**

Afton Chemical Corporation  
BASF  
Chemtura  
Chevron Oronite  
Croda  
DOG Chemie  
Dover Chemical  
Elco  
Infineum  
King Industries  
Lubrizol  
Rhein Chemie  
RohMax  
R.T. Vanderbilt

# Global Lubricant Additives 2010: 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 conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including manufacturers and marketers, distributors and suppliers, and industry associations that cater to the global finished lubricants, lubricant additives, and lubricant basestocks industry.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research represents the bulk of our research efforts, supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; and Internet sources.

Kline is unique in its ability to leverage the skills and synergies of its global basestocks, lubricant additives, and finished lubricant teams. Our firm is one of the premier consultancies that cover the whole lubricant value chain, from raw materials to finished goods. Professionals from our company will conduct research and analysis for this study to deliver a report that is insightful from both a raw material and finished lubricants perspective.

## 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 consumer 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.

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

- Metalworking Fluids Global Series: Market Analysis and Opportunities
- Opportunities in Lubricants: India Market Analysis
- Global Synthetic Lubricants: Market Analysis and Opportunities
- Global Used Oil: Market Analysis and Opportunities
- Global Lubricants: Market Analysis and Opportunities
- Global Lubricant Basestocks: Three-year Annual Service
- Lubricant Basestocks in Africa and the Middle East: Market Analysis and Opportunities

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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