

Global Marine Engine Oil Suppliers 2009: Customer Value-Added Analysis

Published June 2009

Base Year: 2009

Regional Coverage

North America

Europe

Asia-Pacific

Middle East

A study designed to help global suppliers of marine engine oils understand their customers' perceptions of key value drivers that will help them retain current customers and acquire new ones. The study will offer a detailed analysis of global marine engine oil competitors and address such questions as:

- How are we viewed by the marketplace?
- How do we rank against our competitors?
- What is the relative importance of factors like price, product quality and consistency, service quality, product delivery and availability, customer service, and company image?
- How should we prioritize critical customer issues?
- What improvements in the way we meet customer needs will generate the biggest return?
- Is our image as strong as we think it is?

Report Scope

Global Marine Engine Oil Suppliers 2009: Customer Value-Added Analysis is designed to help answer a number of strategically important questions regarding how manufacturers of global marine engine oil products are viewed by their customers and how they compare to their competitors in key areas. Products analyzed include marine diesel cylinder lubricants and trunk piston engine oils.

Key program objectives are to:

- Identify key performance factors used by marine engine oil customers to make buying decisions
- Determine the stated importance (what they say) and the derived importance (how they actually make buying decisions) for each purchase factor
- Use correlations to isolate the critical performance variables from those that are assumed or nice to have
- Compare the performance of competing suppliers on each factor
- Generate relevant suggestions for improvement from both end users and distributors
- Provide a specifically tailored section on implications for each subscriber, including actionable recommendations to enhance or maintain customer satisfaction and loyalty

Key Benefits

This report is designed to:

- Identify critical performance factors and rate your company performance against them
- Show satisfaction and loyalty metrics that display each company's competitive strengths and weaknesses in both marine diesel cylinder lubricants and trunk piston engine oils
- Provide a customer-based snapshot of your product performance and marketing effort measured by your target customers
- Answer crucial customer relationship questions and solicit suggestions for improvement from the people buying your products
- Suggest priority factors for emphasis in future programs—for example, whether to defend your own strong position or try to neutralize a competitor's advantage
- Isolate your strongest users and measure their satisfaction and loyalty versus your competitors' strong users
- Provide easily understood graphics to present findings to management

Report Contents

1. INTRODUCTION

- Background
- Methodology
- Company importance among end users

2. PURCHASE DECISION FACTOR IMPORTANCE

- Stated versus derived importance
- Comparison of stated and derived importance with a focus on critical factors

3. SATISFACTION AND LOYALTY COMPARISONS

3A. Marine Diesel Cylinder Lubricants

3B. Trunk Piston Engine Oils

Both sections of this chapter include the following:

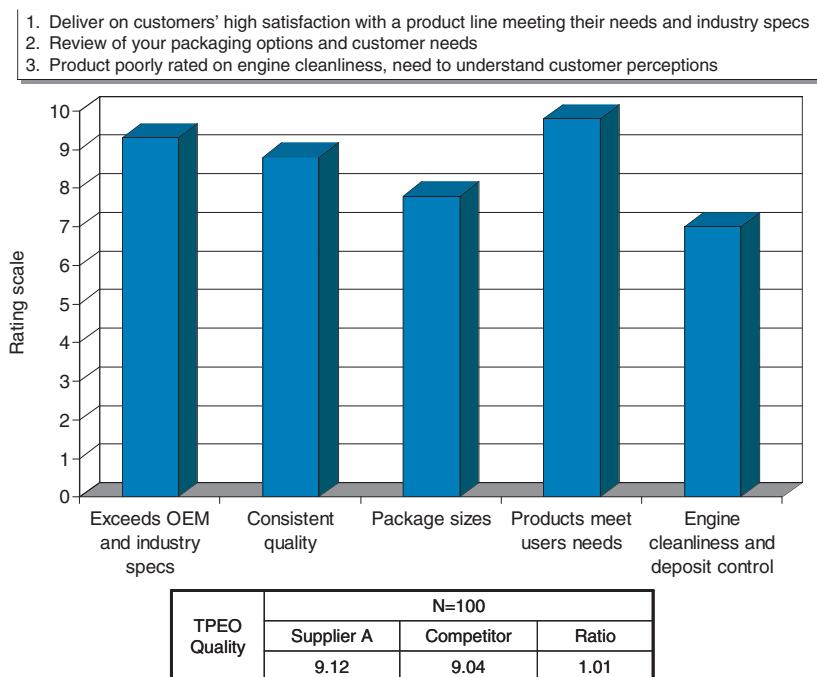
- Rating comparisons
- Product-related comparison (see example in Figure 1)
- Support-related comparison
- Price-related comparison
- Loyalty comparison
- Strong user comparison
- Satisfaction and loyalty comparisons

4. COMPANY OVERVIEWS

This chapter is customized for each subscriber and includes:

- Summary of company competitive performance
- Suggestions for improvement/defense
- Sources of customer dissatisfaction

Figure 1
Sub-Attribute Mean Scores: Trunk Piston Engine Oil Quality



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

We use structured interviews with approximately 300 end users, as well as a group of about 25 distributors. They were interviewed in the regions where headquarters are located, limited to the locations described below:

- North America
- Europe (ex-Rotterdam)
- Asia-Pacific (ex-Hong Kong and Singapore)
- Middle East (ex-Dubai)

The interviews are about 20 minutes in length. The interviews are conducted by members of Kline's Energy practice who understand the nuances of the marine engine oils industry.

Manufacturers are rated on about 25 purchase factors. A sample is provided in Figure 2. The first step is to solicit responses regarding the importance of each of these factors. Then the performance of each manufacturer is rated against these factors to generate the derived importance of each factor, as shown in Figure 3.

Loyalty scores are developed to compare loyalty of both strong users and users as a group. An action grid will also be created to show how each competitor is rated on the most critical factors.

A color-coded factor comparison table is assembled to quickly compare the stated rankings and analyze each manufacturer's advantages or disadvantages. A specific set of implications and recommendations are then developed for each subscriber based on interpreting the data from each subscriber's 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 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.

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- LubesNet Database 2008: Annual Online Subscription
- Metalworking Fluids 2008 Global Series
- Natural Gas Markets in the Coastal Provinces of China 2008: Economic and Volumetric Implications for Gas Suppliers
- Opportunities in Lubricants, North America
- The Chinese Lubricants Market
- Global Lubricant Additives

Figure 2
Sample Purchase Factors

Illustrative

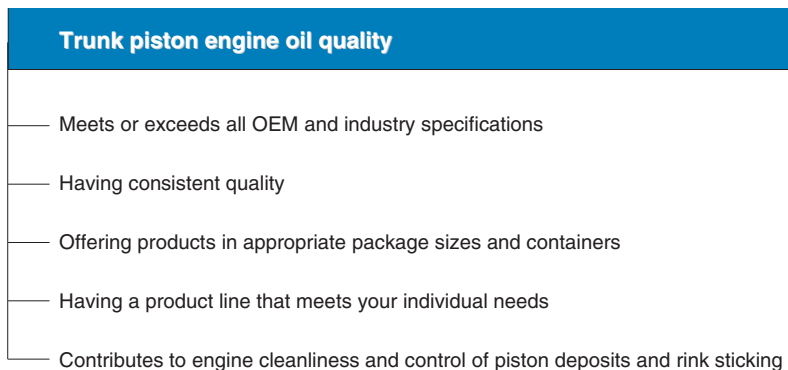


Figure 3
Sample Impact Analysis for Sub-Attributes

Illustrative

Supplier A: Includes all sub-attributes driving overall product and service quality, and price customer satisfaction

Impact weight, %	High	Products exceed OEM specs-a	Staying abreast of changing technology-b	
	Medium		Customer service reps that know their products-c Offering competitive pricing-d	Offering advice and technical support-e
	Low	Keeping you informed of new products and services-f		
		>X.XX	X.XX - X.XX	<X.XX
		Overall mean score		

- a- TPEO quality.
- b- Image.
- c- Customer service and order placement.
- d- Price.
- e- Technical service and support.
- f- Sales representative.

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