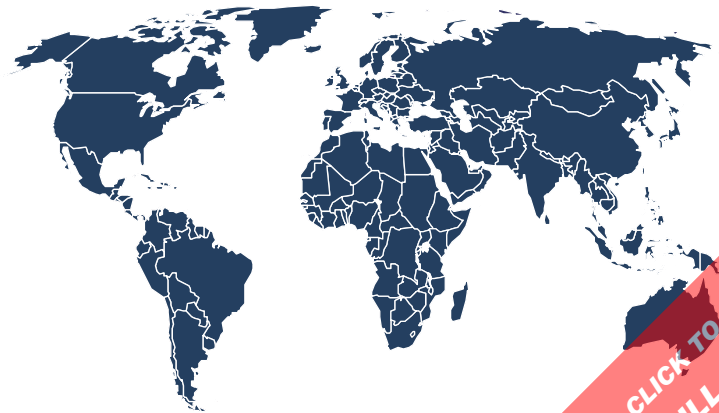




Freedonia Focus Reports
World Collection

World Lubricants

December 2015



Highlights

World Overview and Forecasts
Demand by Product | Demand by Market

Regional Trends and Forecasts
Regional Demand Overview | North America | Western Europe | Asia/Pacific
Other Regions

Industry Structure
Industry Composition and Characteristics | Additional Companies Cited

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ABOUT THIS REPORT

Scope & Method

This report forecasts total world demand in 2019 for lubricants by product, market, and major world region in metric tons. Product segments include:

- engine oils
- process oils
- hydraulic fluids
- metalworking fluids
- other products such as gear oils, greases, and transmission fluids.

In this report, tractor transmission fluids (also known as universal tractor fluids) are included with hydraulic fluids, while all other transmission fluids are included in the other products category. It should also be noted that world base oil demand is discussed in terms of the location of finished lubricant end use and not of lubricant production or blending. Additionally, American Petroleum Institute Group III base oils and lubricants from which they are formulated are classified in this report as synthetic products.

Reported markets encompass:

- motor vehicle aftermarket
- manufacturing
- other markets such as agriculture, construction, and non-motor vehicle transportation.

Major world regions include:

- North America
- Western Europe
- Asia/Pacific
- all other regions.

Demand by product segment is also forecast for each major world region.

To illustrate historical trends world, product, market, and regional demand (including product segments) are provided for 2009 and 2014. Further, regional demand is segmented by market for 2014.

This report quantifies trends in terms of compound annual growth rates (CAGRs), which, by definition, employ in their calculation only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the trend beginning in the base year and ending in the forecast year. Forecasts are developed via the identification and analysis of pertinent statistical relationships and other historical trends and events, as well as their expected impact over the forecast period. Readers are encouraged to consider historical volatility when assessing particular annual values

along the forecast trend, including in the forecast year.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the [Table of Contents](#).

Sources

World Lubricants (FW35022) is based on [a comprehensive industry study](#) published by The Freedonia Group in December 2015. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other industry studies by The Freedonia Group.

Specific sources and additional resources are listed in the [Resources](#) section of this publication for reference and to facilitate further research.

Industry Codes

The topic of this report is related to the following industry codes:

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
324110	Petroleum Refineries	2869	Industrial Organic Chemicals, NEC
324191	Petroleum Lubricating Oil and Grease Manufacturing	2899	Chemicals and Chemical Preparations, NEC
325199	All Other Basic Organic Chemical Manufacturing	2911	Petroleum Refining
325998	All Other Miscellaneous Chemical Product and Preparation Manufacturing	2992	Lubricating Oils and Greases

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