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Lubricants

US Industry Study with Forecasts for **2012 & 2017**

Study #2384 | September 2008 | \$4700 | 369 pages

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While volume gains will be restricted by longer-lasting lubricants, growth in value will continue to be driven by the impact of high base oil costs and shifts toward higher-quality formulations.

US market value to reach \$17 billion in 2012

Demand for lubricants in the US will increase nearly one percent per year to 2.5 billion gallons in 2012, growing off a weak base. Market value will approach \$17 billion, an annual increase of more than four percent from 2007. Advances will largely be a result of climbing demand for engine oils, which will benefit from the increasing number of motor vehicles in use. Additionally, growth in the manufacturing sector is expected to fuel demand for industrial lubricants such as hydraulic fluids, process oils and greases. However, volume gains will be restricted by trends toward longer-lasting lubricants, which extend oil drain intervals and reduce overall lubricant requirements. The growth in value will continue to be driven by the impact of high base oil costs and shifts toward higher-quality formulations.

Significant shifts in demand for lubricating base oils are expected, as performance requirements of finished lubricants continue to change. Together, higher quality basestocks such as Group II, II+ and III petroleum oils, as well as synthetic types, are expected to increase their share of the market at the expense of Group I base oils, particularly over the longer term. Better quality base oils are necessary for lubricants to comply with the variety of new standards in the industry, including ILSAC GF-5 motor oils, API CJ-4 diesel engine oils, and DEXRON-VI transmission fluids.



Engine oils to benefit from oil change market

Demand for engine oils -- which accounted for nearly half of total lubricant demand in 2007 -- will be boosted by the increasing number of motor vehicles in use, although this will be offset somewhat by trends toward smaller automobiles, less frequent oil changes and a decline in the miles driven per automobile. The "Do-It-For-Me" engine oil change market will continue to benefit from the decline in the "Do-It-Yourself" market as aging baby boomers continue to change sectors. Dealerships are expected to benefit the most from this switch as they use oil changes as a loss leader to attract customers for the more profitable repair work. Above average

engine oil demand is also expected to come from the agricultural sector and the construction industry.

Demand for process oils is forecast to lag overall lubricant demand. Although process oils are often incorporated into the finished product, making them less vulnerable to factors such as recycling and extended drain intervals, some weakness in key markets such as cosmetics and toiletries and inks is likely to dampen gains. Demand for transmission and hydraulic fluids is projected to reverse recent declines, although growth will be below average for the industry due to changing standards for automatic transmission fluids, which will continue to increase drain intervals.

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Sample Text, Table & Chart

LUBRICANT BASE OILS

Synthetic Lubricants

US demand for synthetic lubricants is forecast to advance 4.5 percent annually through 2012 + 2017. Synthetic lubricants are expected to gain market share at the expense of conventional lubricants due to their superior performance and environmental benefits. The demand for fully synthetic and synthetic lubricants is expected to continue to grow for growth will be in engine oils, where synthetic lubricants have the best performance and environmental benefits. Consumer acceptance. However, the transition from highly refined petroleum-based lubricants to synthetic lubricants is slower than some similar performance and environmental properties more costly than synthetic lubricants. For the purposes of this report, a synthetic lubricant is one whose basestock is manufactured by chemical synthesis through an organic reaction. This definition is in contrast to a lubricant whose oil is extracted or refined from naturally occurring sources. All synthetic lubricants formulated with Group III petroleum base oils are considered conventional in this report. Additionally, in the case of synthetic blends, only the synthetic portion of the blend is included in the totals.

Synthetic lubricants are designed to provide primarily the same lubrication functions as petroleum lubricants. However, synthetic lubricants can also be custom formulated to meet a combination of requirements for specific applications. Synthetic lubricant formulations typically provide enhanced performance properties versus their petroleum counterparts. Such properties include:

- petroleum compatibility
- hydrolytic stability
- low volatility
- viscosity temperature behavior
- low temperature fluidity
- paint and elastomer compatibility

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**SAMPLE
TEXT**

TABLE IV-16

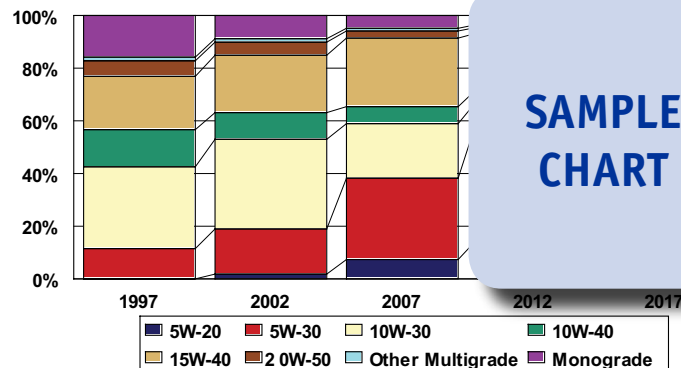
TRANSMISSION & HYDRAULIC FLUID DEMAND (million gallons)

Item	1997	2002	2007	2012	2017
Motor Vehicles in Use (mil gal/vehicle)	200	200	245	255	260
Transmission & Hydraulic Fluids					
By Type:					
Automatic Transmission Fluids					
Tractor Hydraulic/Transmission Fluids					
Power Steering & Other Fluids					
By Market:					
Light Vehicle Aftermarket					
Commercial/Industrial					
Durable Goods Manufacturing					
Transportation Equip Aftermarket					
% transmission Lubricant Demand	2800	2600	2453	2350	2600

**SAMPLE
TABLE**

CHART IV-16

MOTOR VEHICLE ENGINE OIL DEMAND BY GRADE, 1997-2017 (percent of total)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE V-27
NONDURABLE GOODS LUBRICANT DEMAND
 (million gallons)

Item	1997	2002	2007	2012	2017
Nondurable Goods Shpts (bil 2000\$)	170	200	243	253	260
gal lubricant/mil \$ shpts					
Nondurable Goods Lubricants					
By Market:					
Plastics & Rubber					
Food & Beverages					
Cosmetics & Toiletries					
Printing Inks					
Chemicals					
Paper & Textiles					
Other					
By Product:					
Process Oils					
General Industrial Oils					
Other Lubricants					
% nondurable goods Lubricant Demand	1.7	2.0	2.4	2.5	2.6
	2800	2800	2433	2530	2600



COMPANY PROFILES

Sonneborn LLC
 575 Corporate Drive, Suite 415
 Mahwah, NJ 07430
 201-760-2940
<http://www.sonneborn.com>

Annual Sales
 Employment

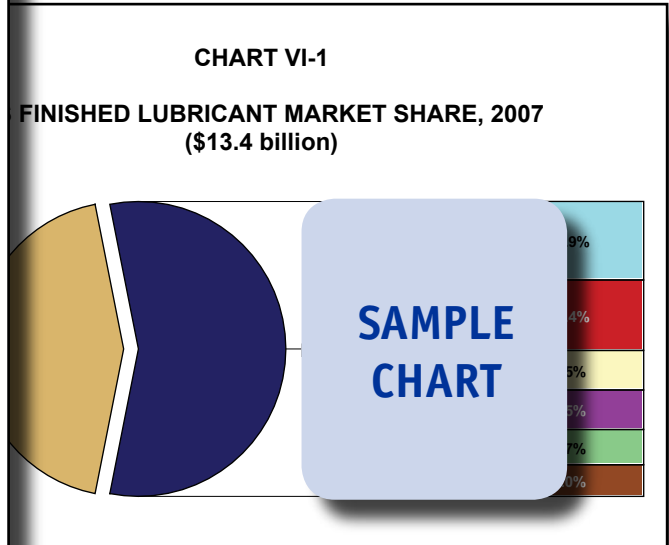
Key Products and services include: lubricants, and refrig...

Sonneborn LLC produces a wide range of lubricants, including petrolatums, microcrystalline paraffinic base oils, and specialty oils. The Company serves the automotive, industrial, marine, and aviation markets. Key products include engine oils, hydraulic fluids, gear oils, and greases. The Company also provides lubrication services and technical support to its customers.

The Company's lubricants include several ink oils, white oils, compressor lubricants, petrolatums and refrigeration oils. Sonneborn's ink oils, which are marketed under the WITSOL brand name, are hydrocarbon solvents used in the formulation of printing inks. White oils from the Company encompass products marketed under the HYDROBRITE, CARNATION, KAYDOL, KLEAROL, PROTOL, GLORIA, ERVOL, RUDOL, BLANDOL and BENOL brand names. In general, these mineral oils consist of saturated aliphatic and alicyclic non-polar hydrocarbons; and are hydrophobic, colorless, tasteless, odorless and chemically inert. Among the end-use markets for these lubricants are the pharmaceuticals, personal care, food processing, baking, agricultural and adhesives industries. For example, HYDROBRITE plastic oils are used in the formation of rigid polyvinyl chloride pipe, window

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OTHER STUDIES

Fuel & Lubricant Additives

The US market for fuel and lubricant additives is analyzed in this study. It presents historical demand data for 1997, 2002 and 2007 and forecasts for 2012 and 2017 by type and application. The study also considers market environment, environmental and regulatory factors affecting demand, as well as the overall outlook for the petroleum industry. Included are profiles of industry competitors and evaluations of company market share.

#2409 12/2008..... \$4500

Well Stimulation Materials

Buoyed by historically high oil and gas prices, US demand for well stimulation materials will grow 14% annually through 2012. All important product types will register strong growth as US oilfield operators struggle to sustain production levels. Proppants, the largest category, will double in market value. This study analyzes the \$2.8 billion US well stimulation material industry, with forecasts for 2012 and 2017 by product and regional market. It also evaluates market share and profiles industry competitors.

#2358 06/2008..... \$4600

Solvents

Demand for solvents in the US will reach 11.8 billion pounds in 2012. Esters and alcohols will exhibit the best growth within the conventional solvents product group, though green solvents such as hydrogen peroxide and supercritical fluids will post more rapid gains. This study analyzes the \$5.5 billion US solvents industry, with forecasts for 2012 and 2017 by solvent product, market and function. It also considers market environment factors, evaluates company market share and profiles industry players.

#2357 06/2008..... \$4600

World Biofuels

Global demand for biofuels will grow 20% annually through 2011, despite concerns about their impact on the environment and food supplies. Bioethanol and biodiesel will lead gains. North America will remain dominant while the Asia/Pacific region and Western Europe grow faster. This study analyzes the 37.7 million metric ton world biofuel industry, with demand and production forecasts for 2011 and 2016 by fuel, world region and for 16 countries. It also evaluates market share and profiles major players.

#2287 03/2008..... \$5500

World Lubricants

Global demand for lubricants will reach 41.8 million metric tons in 2010. Gains will be driven by increasing motor vehicle ownership and use and growth in manufacturing activity. Engine oils will continue to claim over half of demand, while process oils will grow the fastest. Manufacturing markets will lead gains. This study analyzes the \$35.7 billion world lubricant industry for 2010 and 2015 by formulation, product, world region and for 31 countries. It also evaluates market share and profiles major players.

#2182 04/2007..... \$5400

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