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World Lubricants

Industry Study with Forecasts for **2015 & 2020**

Study #2771 | July 2011 | \$6100 | 486 pages

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The fastest gains will continue to be in Asia -- followed by the Africa/Mideast region and Central and South America -- based on strong economic growth and expanding motor vehicle parks.

World demand to reach 41.7 million metric tons by 2015

World demand for lubricants will rise 2.6 percent annually to 41.7 million metric tons in 2015, driven primarily by strong economic growth as countries continue to recover from the impact of the global economic recession in 2009. The fastest increases will continue to be in Asia, followed by the Africa/Mideast region and Central and South America. In addition to strong economic growth, all three of these regions will benefit from above-average increases in their motor vehicle park. Healthy advances in Eastern Europe will reflect a rebound in the region's industrial output. While still below the global average, advances in North America and Western Europe will also contribute to rising global demand, reversing the secular declines of the previous decade.

With per capita motor vehicle ownership rates rising quickly in Asia, the Middle East, Central and South America, and Eastern Europe, motor vehicle lubricant demand will continue to expand. Motor vehicles are the largest market for lubricants, and growth will be led by strong gains in the developing Asian countries due to rapid expansion of the motor vehicle park, particularly in China and India. However, the trend toward increased drain intervals, influenced in part by the growing availability of superior, high-performance synthetic lubricants, will result in declining demand in Western Europe and North America.

World Lubricant Demand, 2010 (36.7 million metric tons)



Asia/Pacific
37%

North America
24%

Western Europe
13%

Other Regions
26%

photo: Ciba

Hydraulic fluids, process oils to post fastest growth

In terms of product types, engine oils will continue to account for the greatest share of lubricant demand going forward. This will primarily reflect the importance of transportation in an increasingly global economy, from both a consumer and a commercial perspective. Hydraulic fluids will post the fastest growth due to a combination of increased demand in manufacturing operations and strong global growth in natural resource extraction industries such as mining and oil and natural gas production. Above-average growth will also occur in process oils, backed by strong growth in food processing, as well as in plastic and

rubber processing. Metalworking fluids and engine oils, in contrast, will advance at a below-average pace, as these lubricants have proven to be more easily conserved through fluid management programs and the introduction of higher-quality products with extended operating lifetimes. Despite the slow growth in metalworking fluids, significant value opportunities will still exist for new, higher-performance oils, and/or more environmentally friendly fluids that meet the increasingly strict regulations found in developed countries. This will be reflected in the above-average advances in nonconventional lubricant demand going forward, even as traditional petroleum-based lubricant demand continues to expand as well.

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Sample Text, Table & Chart

MARKETS

Brazil: Markets -- Lubricant demand in Brazil is forecast to reach 1.5 million metric tons in 2015. A favor of the three main outlets, though growth in the automotive market will trail the gains in manufacturing. Growth will be in the resource extracting sector, which will benefit from strong global commodity prices. A healthy global economy will also drive significant demand growth. The large motor vehicle market will experience below-average growth, held back by lengthening drain intervals, which will restrain the effects of the rapid expansion of the number of vehicles in use.

Lubricant use in the motor vehicle aftermarket in Brazil comprised 43 percent of overall sales in 2010, and will continue to post notable gains as the country's motor vehicle park expands. There is still considerable opportunity for growth in this sector as consumers in Brazil have historically tended to focus more on repair than prevention and thus could benefit from education on proper maintenance schedules. In addition, improvement in the quality of the vehicle fleet and growing disposable incomes should boost demand for higher-performance oils, thus increasing market value. This will be aided to some extent by growth in Brazil's fast lube change industry. A rebound in domestic and export trade activity following the global economic downturn will provide further growth impetus to sales of heavy-duty diesel lubricants, which account for a significant share of the market.

Brazil has a well-developed industrial base, with numerous manufacturers of products such as primary and fabricated metal vehicles and parts, electronics, and heavy machinery, all of which are heavy users of lubricating oils. Demand in the manufacturing sector is expected to grow through 2015, along with a strengthening of the economy following a slowdown caused by the global recession.

269

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TABLE VII-4

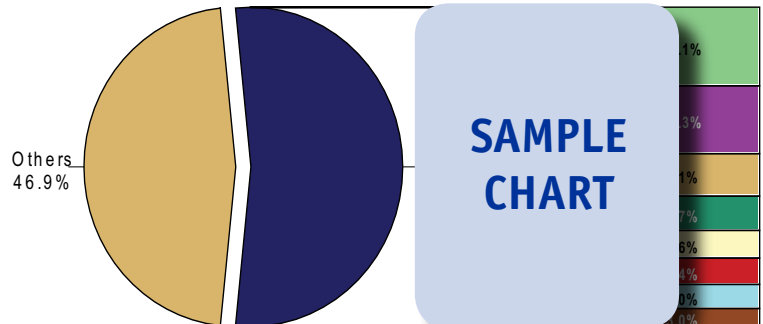
BRAZIL: LUBRICANT DEMAND BY MARKET
(thousand metric tons)

Item	2000	2005	2010	2015	2020
Gross Domestic Product (bil 2009\$) kg lubricant/mil \$ GDP					
Motor Vehicles in Use (mil units) kg MV lubricant/vehicle					
Lubricant Demand					
Motor Vehicle Aftermarket					
Manufacturing					
Other					

SAMPLE TABLE

CHART VIII-1

WORLD LUBRICANT MARKET SHARE BY COMPANY
(36.7 million metric tons, 2010)



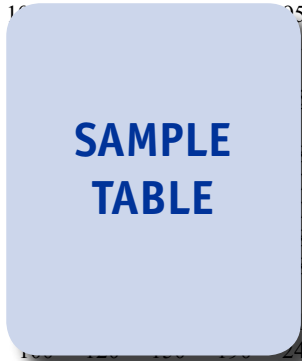
SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VII-5

BRAZIL: LUBRICANT DEMAND BY PRODUCT & FORMULATION
(thousand metric tons)

Item	2000	2005	2010	2015	2020
C&S America Lubricant Demand	10	10	10	10	10
% Brazil	0.5	0.5	0.5	0.5	0.5
Brazil Lubricant Demand	20	20	20	20	20
By Product:					
Engine Oils	10	10	10	10	10
Process Oils	0.5	0.5	0.5	0.5	0.5
Hydraulic Fluids	0.5	0.5	0.5	0.5	0.5
Metalworking Fluids	0.5	0.5	0.5	0.5	0.5
Other	0.5	0.5	0.5	0.5	0.5
By Formulation:					
Petroleum	10	10	10	10	10
Nonconventional	0.5	0.5	0.5	0.5	0.5



COMPANY PROFILES

Emirates General Petroleum Corporation
 Sheikh Zayed Road
 PO Box 9400
 Dubai
 United Arab Emirates
 971-4-343-4444
<http://www.emiratesgeneral.com>

Annual Sales: \$1.5 billion
 Employment: 1,500
 Key Products: Industrial Lubricants

SAMPLE PROFILE

Emirates General Petroleum, which is also known as Emarat, is primarily involved in the marketing, transportation and storage of petroleum products throughout the United Arab Emirates (UAE). The Company, which is owned by the government of the UAE, also has operations elsewhere in the Africa/Mideast region and Southeastern Asia.

The Company is active in the world lubricant market through the manufacture of industrial, automotive and marine lubricants for use in machinery, heavy-duty equipment, vehicles and marine equipment. These lubricants are supplied in corporate plastic pails, packs, 208-liter drums and metal cans. Emarat manufactures numerous industrial lubricants, including CIRCULA high-quality, high-velocity-index, general-purpose oils; HYDRAMAX hydraulic oils; FLUSHMAX flushing oils; PRESSMAX compressor oils; PNEUMAX rock drilling oils; and CLASSIC greases and specialty greases. The Company also makes a number of specialty industrial lubricants, such as TEXMAX textile oils and WAYMAX slideway oils, as well as various cutting oils, quenching oils and roll bearing oils.

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“Demand for lubricants in Brazil is forecast to grow 3.0 percent per year to 1.4 million metric tons in 2015, aided by strong economic growth both domestically and globally. In particular, key areas such as manufacturing, transportation and mining will benefit. In addition, healthy motor vehicle sales are expected to support continued growth in Brazil’s motor vehicle park even as lengthening drain intervals restrain lubricant demand growth.”
 --Section VII, pg. 270-1

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OTHER STUDIES

World Oilfield Chemicals

Global oilfield chemical demand will rise 8.6 percent yearly through 2014, driven by a recovery in the oil and gas industry and higher oil and gas prices. North America will remain the dominant market while the Central and South American region grows the fastest. Stimulation and enhanced oil recovery chemicals will lead gains. This study analyzes the \$13.7 billion world oilfield chemical industry, with forecasts for 2014 and 2019 by product, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2702December 2010 \$5900

Lubricants

US demand for lubricants will reverse recent declines, supported by a turnaround in motor vehicle production, an acceleration in the number of automobiles in use, and increased manufacturing output. Higher-quality Group II/III+ and Group III basestocks, as well as synthetic types, will increase their share of the market. This study analyzes the 2.1 billion gallon US lubricant industry, with forecasts for 2014 and 2019 by base oil, product and market. It also evaluates company market share and profiles industry players.

#2677October 2010 \$4900

World Biofuels

Global biofuel demand will grow 10.3 percent annually through 2014. Bioethanol will see the greatest gains, driven by the large North American market as well as the faster growing markets in the Asia/Pacific region and Europe. The smaller biodiesel market will be the more rapidly growing segment. This study analyzes the 74.1 million metric ton global biofuel industry, with forecasts for 2014 and 2019 by product, world region and for 28 countries. It also evaluates company market share and profiles industry participants.

#2668September 2010..... \$5900

Refinery Chemicals

US refinery chemical demand will rise five percent annually through 2014, driven by the use of new, higher-value products that offer enhanced performance. Merchant hydrogen will remain the largest product type and grow the fastest. Petroleum treatment and conversion will remain the largest and fastest growing applications. This study analyzes the \$5.5 billion US refinery chemical industry, with forecasts for 2014 and 2019 by application and product. It also evaluates company market share and profiles industry players.

#2629April 2010 \$4700

Synthetic Lubricants & Functional Fluids

US demand for synthetic lubricants and functional fluids will expand 3.2 percent annually through 2013. Engine oils and hydraulic and transmission fluids will grow the fastest as synthetics finally begin to penetrate the medium- and heavy-duty truck market and expand market share in the light vehicle segment. This study analyzes the \$4.1 billion US synthetic lubricant and functional fluid industry, with forecasts for 2013 and 2018 by product, material and market. It also evaluates company market share and profiles industry competitors.

#2582March 2010..... \$4700

About The Freedonia Group

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