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# World Lubricants

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Industry Study with Forecasts for 2019 & 2024

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Study #3364 | December 2015 | \$6500 | 468 pages

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## INDUSTRY STRUCTURE

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*Growth in lubricant demand will be driven by continued economic growth, rising manufacturing output, and increasing motor vehicle production and ownership rates in developing countries.*

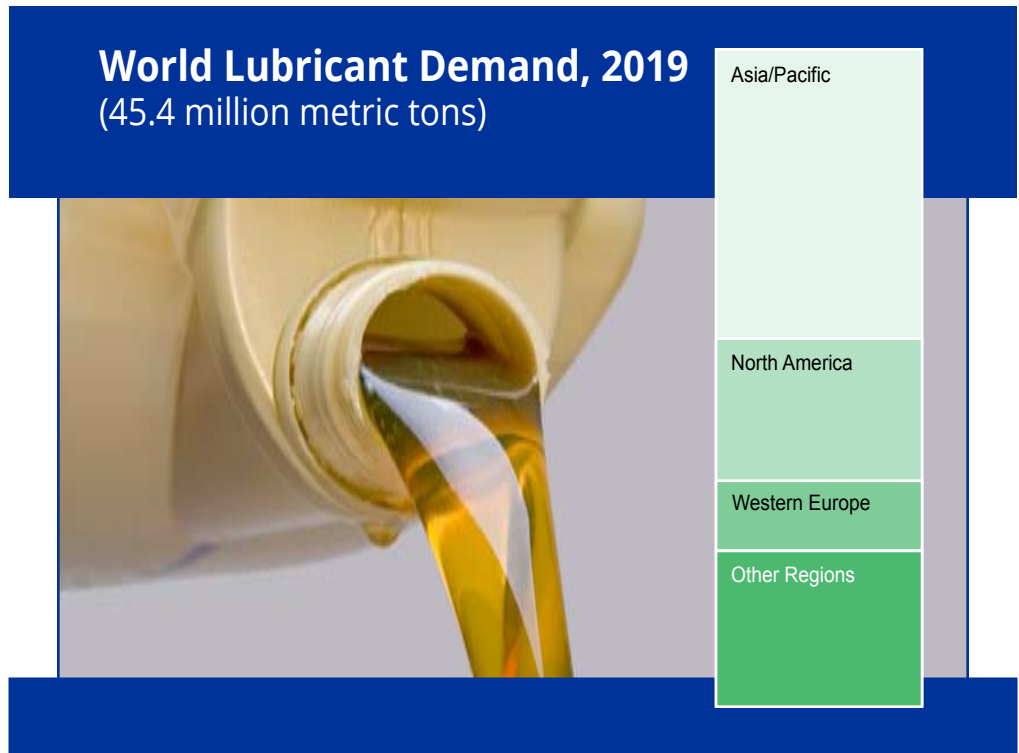
## World demand to rise 2% annually through 2019

World demand for lubricants is projected to rise 2.0 percent annually to 45.4 million metric tons in 2019. The fastest gains are expected in the Asia/Pacific region, where an expanding number of motor vehicles in use and continued industrialization in large countries such as China and India will support rising demand. Developing regions such as Central and South America and the Africa/Mideast region will also exhibit healthy gains in response to economic growth, rising manufacturing output, and increasing motor vehicle production and ownership rates.

More mature markets, such as the United States, Western Europe, and Japan, are expected to stay fairly flat, as the greater availability of premium lubricant products with longer drain intervals will restrain growth. Additionally, many of these developed countries enforce strict regulations on the use and disposal of lubricants, which will drive demand for nonconventional lubricants, such as more environmentally friendly bio-based lubricants and lubricants derived from re-refined base oils.

## Manufacturing to be fastest growing market

The motor vehicle aftermarket will remain the largest end use for lubricants; however, as drain intervals lengthen and as electric vehicle ownership rates increase in developed nations, growth



will trail the other major markets for lubricants. Demand in the manufacturing market will post faster gains as manufacturing output expands, particularly in developing regions. In addition, quality will continue to improve as manufacturers increasingly demand lubricants that are effective in a wider range of operating conditions. In the remaining markets, lubricant demand is also expected to rise at an above-average pace. Growth will be supported by factors such as increasing mechanization in agriculture, construction, mining, and other industries in developing regions; increased oil and gas production; and greater use of non-motor vehicle transportation such as marine and railroad transport in response to improved economic conditions.

## Process oils to be fastest growing product category

Process oils are expected to be the fastest growing product category, supported by gains in manufacturing output, particularly in the Asia/Pacific and other industrializing regions. Additionally, process oils are less strongly impacted by the introduction of higher quality products. Because process oils are often a component of a finished manufactured product, it is difficult to reduce their volume usage, even as quality improves, due to increasingly stringent performance requirements. Demand for hydraulic fluids, metalworking fluids, and other lubricants will also benefit from an improving economy.

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## Sample Text, Table & Chart

### OTHER REGIONS

**Iran: Markets** -- Demand for lubricants in Iran is expected to grow to 1.2 million metric tons in 2019. Growth is expected to be driven by aftermarket demand over the forecast period as manufacturing growth accelerates. Manufacturing lubricant demand will continue to be the country's main driver, but it will lag both motor vehicle and industrial demand due to the negative economic sanctions on the country's oil industry and the resulting impact on the broader economy.

Motor vehicle aftermarket use forms the largest market for lubricants in Iran. Low average lubricant quality contributes to short drain intervals, thus increasing the volume of lubricants consumed per vehicle. Although the recent rapid increases in vehicle ownership have led to the motor vehicle park being made up of an increasing number of newer vehicles, economic sanctions and a lack of foreign investment have prevented an accompanying rise in lubricant quality. This situation will persist through the forecast period and result in motor vehicle lubricant use continuing to grow at a rapid pace.

Motor vehicle production is a large contributor to manufacturing lubricant consumption in Iran. Following declines between 2009 and 2014, rapid growth in the country's automotive industry is expected to resume, driving future demand for lubricants. Accelerated output from Iran's other manufacturing sectors will also support gains. Although a number of other markets are significant consumers of lubricants in these markets is tied most strongly to the oil and natural gas sectors. While Iran holds among the world's largest reserves of natural gas and crude oil, most of its oilfields are quite old at this point, and its ability to export oil has been crippled by sanctions.

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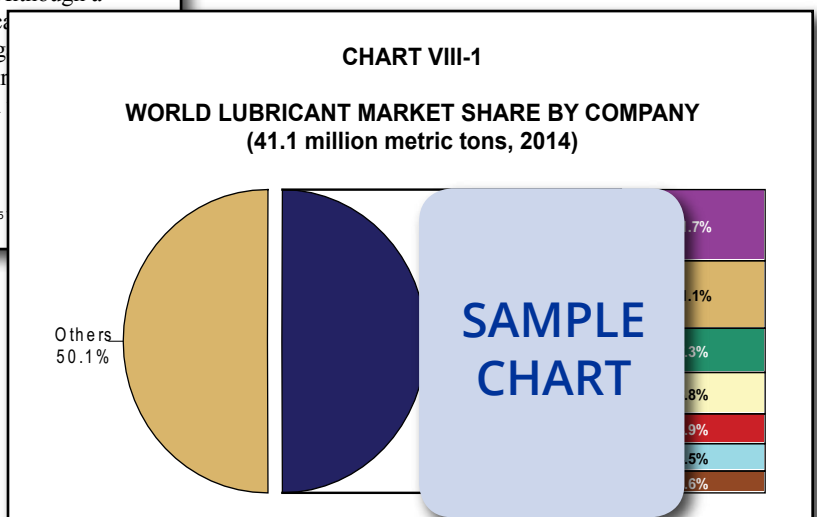
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**TABLE V-4**

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

Item	2004	2009	2014	2019	2024
Western Europe Lubricant Demand % Germany					
Germany Lubricant Demand					
By Product:					
Engine Oils					
Process Oils					
Hydraulic Fluids					
Metalworking Fluids					
Other Products					
By Formulation:					
Petroleum					
Nonconventional					

Source: The Freedonia Group, Inc.

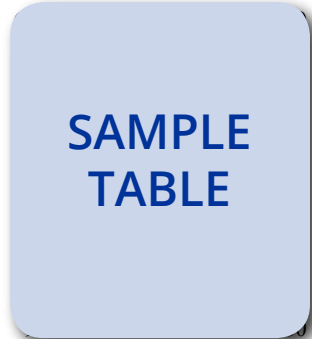


## Sample Profile & Table, & Study Coverage

**TABLE VI-5**  
**CHINA: LUBRICANT DEMAND BY MARKET**  
 (thousand metric tons)

Item	2004	2009	2014	2019	2024
Gross Domestic Product (bil 2013\$) kg lubricant/mil \$ GDP					
Motor Vehicles in Use (mil units) kg MV lubricant/vehicle					
Lubricant Demand					
Motor Vehicle Aftermarket:					
Light Vehicles					
Medium & Heavy Trucks & Buses					
Manufacturing					
Other Markets					

Source: The Freedonia Group, Inc.



**COMPANY PROFILES**

**Eni SpA**  
 1, piazzale Enrico Mattei  
 00144 Rome  
 Italy  
 39-06-59  
 www.eni.it

Sales: \$1.2 billion in 2014  
 Geographical distribution: Europe 27%, Other European Countries 11%, Africa 6%, Asia 11%, Americas 11%, Other 33%

**SAMPLE PROFILE**

Key Products: lubricant base oils; and transportation and industrial finished lubricants

Eni SpA is involved in the oil, natural gas, electricity generation, oilfield services, and engineering markets. The Company operates in seven major segments: Exploration and Production, Gas and Power, Refining and Marketing, Versalis, Engineering and Construction, Other Activities, and Corporate and Financial Companies. The Italian government owns a 30-percent stake in Eni.

The Company competes in the world lubricant industry through the Refining and Marketing segment, which had sales of \$71.6 billion and employed 6,770 in 2014. The segment comprises operations for the refining and marketing of various petroleum products, including lubricant base oils and finished lubricants. Eni produces more than 650 types of transportation and industrial lubricants. Specific transportation products include I-SINT, I-SINT PROFESSIONAL, and I-SINT TECH passenger car engine oils; I-SIGMA heavy-traction lubricants for trucks; I-RIDE motorcycle engine oils; CLADIUM and SIGMA

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**STUDY COVERAGE**

This Freedonia study, *World Lubricants*, presents historical demand data (2004, 2009, 2014) plus forecasts (2019, 2024) by product, formulation and market for 6 regions and 25 major countries. Total demand is given for an additional 8 countries. This study also considers market environment factors, details the industry structure, evaluates company market share and profiles 33 industry players.





## Related Studies

### Waxes

US demand for waxes will rise 1.8 percent annually through 2019 to three billion pounds, with value demand reaching \$3.2 billion. Petroleum and mineral waxes will remain the dominant types, while synthetic waxes will grow the fastest. The leading industrial market will provide the best opportunities, particularly in the production of coatings and inks, adhesives, and building boards. This study analyzes the \$2.4 billion US wax industry, with forecasts for 2019 and 2024 by type and market. The study also evaluates company market share and profiles industry players.

#3271..... May 2015..... \$5200

### Surfactants

US demand for surfactants will rise 3.2 percent per year to 10.9 billion pounds in 2018, valued at \$14.4 billion. Industrial markets will grow the fastest, benefiting specialty surfactants the most. Personal care products will also offer good market opportunities, led by surfactants that are gentle on skin and hair and are environmentally sustainable. This study analyzes the 9.3 billion pound US surfactants industry, with forecasts for 2018 and 2023 by market and product. The study also evaluates company market share and profiles industry participants.

#3247..... January 2015..... \$5200

### Synthetic Lubricants & Functional Fluids

US synthetic lubricant and functional fluid demand will rise 6.8 percent yearly to \$6.3 billion in 2018. Engine oils will account for the largest share of gains, while Group III base oils will remain the fastest growing type. The energy and power generation, automotive equipment, and industrial machinery markets will grow the fastest. This study analyzes the \$4.6 billion US synthetic lubricant and functional fluid industry, with forecasts for 2018 and 2023 by product, material and market. The study also evaluates company market share and profiles industry competitors.

#3187..... August 2014..... \$5200

### World Biofuels

World demand for biofuels is expected to expand at a 3.6 percent annual pace, reaching 115 million metric tons in 2018. North America and Central and South America will remain the largest regional markets, while the Asia/Pacific region grows the strongest from a relatively small base. Bioethanol will remain the leading biofuel. This study analyzes the 96.3 million metric ton global biofuel industry, with forecasts for 2018 and 2023 by product, world region, and for 22 countries. The study also evaluates company market share and profiles industry participants.

#3179..... August 2014..... \$6200

### Solvents

US demand for solvents is expected to increase at a 1.5 percent annual pace through 2018 to 11 billion pounds. Growing environmental concerns and regulatory pressure will drive demand for "green" solvents that are derived from renewable raw materials. The paint and coatings market will replace the transportation market as the largest solvent consumer. This study analyzes the 10.2 billion pound US solvent industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3169..... June 2014..... \$5100

## About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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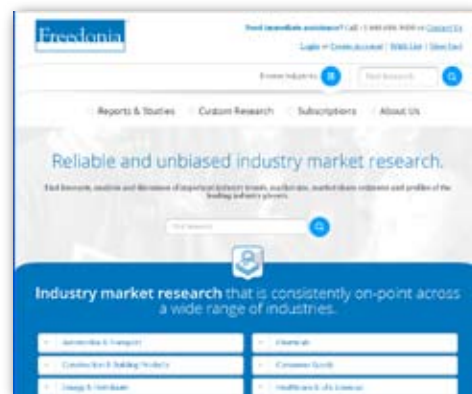
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