



Global Lubricant Additives:

Market Analysis and Opportunities

Published September 2017

Base Year: 2016/2017 early estimates

Forecasts to 2021

Regional Coverage: Asia ■ Europe ■ North America ■ South America ■ Rest of World

Lubricant quality continues to improve driven by regulations for fuel economy and emissions control. This is reflected in the introduction of new quality specifications for passenger car and heavy duty motor oils and the move to lighter viscosity grades. At the same time, lubricant basestock quality continues to improve rapidly and new suppliers enter the market providing new options to lubricant blenders. Both of these factors create new business and growth opportunities and challenges for the lubricant additive industry in an otherwise flat market.

This Report Helps Subscribers to:

- What is the size of the global lubricant additives market?
- What regulations are affecting the market?
- What is the penetration of high quality lubricant in different regions? How does it influence the additives market?
- What are the growth prospects for different additive function classes and products?
- Who are the leading additive suppliers, and what is their competitive position?
- What are the opportunities and challenges for marketers of lubricant additives?



Report Contents

Introduction

Executive Summary

Automotive Lubricant Additives

- Automatic transmission fluid
- Automotive gear oil
- Heavy-duty motor oil
- Passenger car motor oil
- Tractor hydraulic fluid
- Two-cycle engine oil

Metalworking Fluid Additives

- Forming fluid
- Protecting fluid
- Removal fluid
- Treating fluid

Industrial Engine Oil Additives

- Marine engine oil
- Natural gas engine oil
- Railroad engine oil
- Other industrial engine oil

General Industrial Oil Additives

- Compressor and refrigeration oil
- Hydraulic fluid
- Industrial gear oil
- Turbine oil
- Other general industrial oil

Grease Additives

Process Oil Additives

Additive Function Classes

- Antioxidants
- Corrosion inhibitors
- Detergents
- Dispersants
- Emulsifiers
- Extreme-pressure, antiwear, antiseize
- Friction modifiers
- Pour-point depressants
- Viscosity modifiers
- Other additives

Suppliers

- Afton Chemical Corporation
- BASF
- BRB
- Chevron Oronite
- Croda
- DOG Chemie
- Dover Chemical
- Elco
- Evonik
- Infineum
- Jinzhou Kangtai
- King Industries
- Lanxess (covers Rhien Chemie and Chemtura)
- Lubrizol
- Metall-Chemie
- Rhein Chemie
- Sanyo Chemicals
- RT Vanderbilt
- Tianhe Chemical Group
- Wuxi South Petroleum

Special add-on reports via request

- China lubricant additives market



Scope

Global Lubricant Additives: Market Analysis and Opportunities provides a detailed independent appraisal of the lubricant additive market. Estimates of additive consumption by end-use applications, additive function, and regions are provided. Demand estimates for different additive function classes will be further broken down by chemical classes. The study explores market opportunities and challenges for lubricant additive manufacturers and marketers worldwide and provides insights into:

- Lubricant additive demand by application, function, and chemical class
- Lubricant additive demand by region and demand growth over a five-year horizon
- Typical additive formulations and treat rates for different lubricant products and regional variances
- Impact of new quality levels and basestocks on lubricant additive formulations
- Overview of the lubricant additive supply chain from component suppliers to package companies
- Profiles of leading lubricant additive suppliers including emerging suppliers in Asia
- Assessment of market opportunities and challenges

Key Benefits

This report is of particular value to lubricant additive suppliers and finished lubricant formulators and marketers as the industry is moving to optimize additive packages and treat rates for use with higher-performance API Group II, II+, III and gas-to-liquid (GTL) basestocks. This report assists suppliers in identifying opportunities within the global lubricant additive industry. In particular, the study helps in:

- Developing business strategies by understanding the trends and developments in the lubricant additives market
- Supporting product development, marketing and sales strategies
- Supporting market-entry and market expansion strategies
- Evaluating the competitive position of market participants
- Identifying potential alliances, acquisition candidates, and/or customers
- Evaluating growth opportunities for different product types



Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. 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 over 50 years.

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North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277