



2nd Edition

# Global Marine Lubricants: Market Analysis and Opportunities

To Be Published 3rd Quarter 2018

Base Year: 2017

Forecasts to 2022

## Regional Coverage: Global

The global shipping industry faces a period of immense economic and technological challenges. The industry continues to suffer from overcapacity and poor profitability. At the same time, emission limits are set to tighten in the coming years. Engine OEMs, ship owners, oil refiners, and bunker fuel suppliers all face difficult strategic decisions for complying with the new emission regulations while enhancing profitability. These decisions will set the direction of the industry.

## This Report Will Help Subscribers to:

- Gauge demand for marine lubricants by product type, region, and industry segment
- Understand technologies being considered by the shipping industry to meet the emerging emission limits in terms of their costs and effectiveness and their impact on lubricant demand
- Evaluate strengths and weaknesses of leading lubricant suppliers in terms of their products, global coverage, and end-user perceptions
- Understand unmet needs of shipping companies and the key success factors for acquiring their business
- Understand shipping industry trends, growth drivers, and restraints and their impact on lubricant demand
- Understand opportunities and challenges for marine lubricant marketers



# Tentative Report Contents\*

## Introduction

### Executive Summary

- An overview of key findings

### Global Shipping Industry Overview

- Industry structure and segments
- Geographic distribution and key ports
- Global fleet size by type of vessel and power
- Fuel quality trends and emerging fuels (LNG)
- Current and emerging emission regulations
- Technology trends (exhaust gas scrubbers, low-sulfur fuels, slow steaming, exhaust gas recirculation, selective catalytic reduction, waste heat recovery, and other technologies)
- Industry growth and outlook

### Global Marine Lubricant Market Overview

- Product types – specifications, function, and performance
- Information on any differences in lubricant requirements by different ships, such as tankers, cargo ships, and bulkers
- Market demand by product types (System and cylinder oils, TPEO, other)
- Market demand by industry segment (deep-sea, in-land/coastal, other)
- Market demand by region (key ports)
- Market demand of types of ships (tankers, bulker, cargo, and all other)
- Industry supply chain issues and key success factors
- Key suppliers and market shares
- Demand growth and outlook



## Industry Analysis

- Industry trends – economic, technology, regulatory, product, and other
- Growth drivers and restraints
- Market opportunities and challenges

## Company Profiles

Detailed profiles of leading marketers of marine lubricants (listed in Table 1) covering:

- Company background
- Marine lubricant product range
- Sales volume
- Regional coverage
- Marketing and promotions
- Technical capabilities
- Supplier SWOT analysis

\* Subject to charter subscriber input

**Table 1: Leading Marketers of Marine Lubricants**

Aegean Marine Lubricants

BP

Chevron

ExxonMobil

Gulf Oil

LUKOIL

Shell

Total



## Scope

Global Marine Lubricants: Market Analysis and Opportunities will provide a detailed and independent appraisal of the global marine lubricants market and the emerging opportunities for lubricant marketers. The study will cover:

- Demand for marine lubricants at a global level for base year and forecast period
- Analysis of demand by major product categories including system oils, cylinder oils, trunk piston engine oils, and other lubricants
- Analysis of demand by region
- Analysis of demand by industry segments including ocean going vessels, coastal vessels, vessels operating in in-land waterways, and other vessels
- Evaluation of technology trends in play to meet the emerging emission limits
- Profile and evaluation of key suppliers
- Market analysis and identification of opportunities and challenges

## Key Benefits

Subscribers of this report will gain an understanding of the marine lubricants market in terms of the key markets, technology and product trends, market opportunities, and challenges. The report will help subscribers to:

- Develop business strategies by understanding the economic, technological, and regulatory trends shaping and driving the global shipping industry and its impact on marine lubricants.
- Design and develop products, marketing, and sales strategies targeting key end-use segments.
- Develop market-entry and market expansion strategies by evaluating current and future demand scenarios.
- Evaluate major global marine oil suppliers and alliances in terms of their products, supply chain, presence across the major ports, customer perceptions, strengths, and weaknesses.



## 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