

# GLOBAL LUBRICANT BASESTOCKS: Market Analysis and Opportunities

**Base Year: 2020**

**To be published:  
Q3 2021**

**15<sup>th</sup> edition**

**Regional Coverage:**

A comprehensive analysis of the global lubricant basestocks market covering current and future supply and demand dynamics, pricing, and manufacturing costs, this study helps identify opportunities and challenges for industry stakeholders. This edition of the study also includes an **analysis of the impact of COVID-19 on the basestocks market in 2020 and an outlook.**

- Africa and the Middle East
- Asia-Pacific

- Europe
- North America
- South America

## SCOPE

- › Lubricant basestock demand and supply analysis at a global level and by key regions, covering Africa and the Middle East, Asia-Pacific, Europe, North America, South America, and select markets
- › Supply and demand estimates for API Group I, II/II+, III/III+, and naphthenic basestocks, as well as demand estimates for Group IV and Group V basestocks
- › Manufacturing cost analysis of typical Group I, II, and III basestock manufacturing plants
- › Analysis of current pricing levels and price forecast for key grades of Group I, II, and III basestocks across key regions: United States Gulf Coast (USGC), Northwest Europe (NWE), and Northeast Asia (NEA)

An add-on report on global synthetic lubricant basestocks market is available upon request.

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## MODULE 1: SUPPLY-DEMAND ANALYSIS - a

### Introduction

### Overall Market Summary

### Impact of COVID-19 on the Global Basestocks Market

### North America Basestock Market

Profiles for each region will cover the following information:

- Market Overview
- Finished Lubricants Market (current demand by product types and viscosity grades, demand growth, and viscosity grade shifts)
- Formulation Trends
- Current and Projected Basestock Demand by API Groups and viscosity grades
- Basestock Supply (Key plants, capacity, production, viscosity grades produced by API group)
- Projected Capacity Addition and Plant Closures
- Current and Projected Basestock Supply
- Current and Projected Basestock Supply-Demand Balance
- Basestock Trade

### South America Basestock Market

### Europe Basestock Market

### Asia-Pacific Basestock Market

### Africa and the Middle East Basestock Market

a-Base year: 2020; forecasts to 2025 and 2030

## MODULE 2: PRICING ANALYSIS - b

### Basestock Pricing Analysis and Forecast

- Key grades of Group I, II, II+, and III for Northeast Asia, Northwest Europe, and U.S. Gulf Coast
- Key grades of naphthenic basestocks for U.S. Gulf Coast

## MODULE 3: MANUFACTURING COST ANALYSIS

### Manufacturing Cost Analysis of Select Basestocks Plants

- Europe Group I plant
- North America Group II plant
- Asia Group III plant

## MODULE 4: MARKET PROFILES

Each market profile (listed in table 1) contains the following:

- Finished lubricants demand and trends
- Basestocks supply and demand by API Groups and viscosity grades (current and forecast)
- Basestock trade

b-Forecast period: 2020 to 2040

**Table 1. Markets Covered**

Brazil	Japan	South Korea
China	Russia	Thailand
Indonesia		United States
India		

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## Introduction

## Finished Lubricants Demand

This section will discuss penetration of synthetic and semi-synthetic lubricants in various lubricant products. It will also provide a five-year growth outlook for various lubricants (synthetic and semi-synthetics).

## Polyalphaolefins

The general product overview and its characteristics for polyalphaolefins (PAO) will be analyzed, as well as global capacity for high vis- and low vis-PAO, current PAO pricing, PAO supply evolution over the next five years, and profiles for the leading suppliers of PAO.

## Group III/III+

This report will discuss the general product overview and its characteristics, global capacity for Group III and III+ basestocks, current Group III/III+ pricing, Group III/III+ supply evolution over the next five years, and profile the leading suppliers of Group III/III+ basestocks.

## ADD-ON REPORT: GLOBAL SYNTHETIC LUBRICANT BASESTOCKS MARKET

## Synthetic Basestocks Demand

This section will examine the demand for various synthetic basestocks—PAO, Group III/III+, polyalkylene glycol (PAG), synthetic esters, phosphate esters, and polyisobutenes, among others—in various regions and end-use applications. It will also discuss various trends that will affect the demand for such synthetic basestocks over the next five years.



## REPORT BENEFITS

Subscribers to the study will receive an in-depth understanding of the current status of the basestocks industry in terms of basestock supply, basestock application space and demand, lubricant formulation trends, basestock pricing mechanism, inter-region trade, inter-material competition, and manufacturing costs.

Subscribers to the study receive supply demand models for each trade region, which are an invaluable tool for conducting "what-if" analyses based on different assumptions on formulations, viscosity grades and shifts, and overall lubricants demand growth.

The study is a useful tool for sales, marketing, finance, technology, and strategy personnel to quickly learn the fundamentals of the basestock business, understand lubricant basestock requirements of the leading end-use markets, and make business decisions.

## 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 60-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.

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