14th Annual Release Available Online Through Annual Subscription

LubesNet Database

Released January 2020
Base Year: 2019
FutureView Forecast: 2023 and 2028

Regional Coverage: Asia-Pacific ■ North America ■ Europe ■ Africa and the Middle East ■ South America

LubesNet helps assess finished lubricant demand at the global, regional, country market, market segment, product type, and viscosity grade level. **LubesNet** is the definitive source of identifying and quantifying industry trends and opportunities for global, regional, and independent lubricant and additive suppliers.

This Database Provides Answers to Questions such as:

- How has the penetration of 0Ws PCMO evolved in Turkey since 2014, and what portion of the market will 0Ws account for by 2028?
- Which 10 countries are the market leaders in terms of natural gas engine oil demand in 2019, and what changes can be expected by 2023?

- What is the ratio of current to obsolete API Service Category HDMO and PCMO in South Africa?
- How does the forecast growth rate for SAE 10W-30 HDMO demand in the United States compare to Mexico over the forecast period?

Featuring 64 country markets and market share estimates for over 200 finished lubricants suppliers

Database Contents

LubesNet captures finished lubricant consumption in every important lubricant-consuming country market. Demand estimates are segmented according to five core regions, plus a global summary. Each regional segment provides a detailed breakdown of finished lubricant consumption in each country market, plus an "all other" category.

- **Asia-Pacific:** Australia, China, India, Indonesia, Japan, Kazakhstan, Malaysia, Myanmar, New Zealand, Pakistan, the Philippines, Singapore, South Korea, Sri Lanka, Taiwan, Thailand, Vietnam
- **North America:** Canada, Mexico, the United States
- **Europe:** Belarus, Belgium, Croatia, France, Germany, Italy, Netherlands, Poland, Portugal, Russia, Serbia, Spain, Switzerland, Turkey, Ukraine, the United Kingdom
- **Africa and the Middle East:** Egypt, Ghana, Kenya, Kuwait, Morocco, Nigeria, Oman, Qatar, Saudi Arabia, South Africa, the United Arab Emirates
- **South America:** Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Panama, Peru, Puerto Rico, Trinidad & Tobago, Venezuela

LubesNet also includes useful supporting information for all 64 country markets.

- Estimated automotive and industrial lubricants supplier market share
- Synthetic penetration by leading lubricant type
- Vehicle parc size and type
- Segmentation definitions
- Estimated PCMO and HDMO demand by API service category and ACEA OIL sequences

Key Benefits

LubesNet database is easy to use and accessible globally through a single user identification code and password. There are no limitations on the number of users in your organization. An annual subscription to **LubesNet** is an excellent tool to empower sales, management and marketing personnel to utilize the most up to date demand data in their areas of responsibility and specific geographies. It will also serve as an invaluable tool in the strategic planning process.

- This fourteenth edition of **LubesNet** includes a new dashboard and level of functionality for a truly customizable data search and analysis

- The FutureView forecasting tool enables users to override Kline's per annum growth rates to run their own "what if scenarios"

- The Trend View provides a complete view of lubricant demand from 2014 to 2028 to understand how a country market is evolving from low margin to higher margin products

- Kline's supplier market share estimates at the country level help with entry strategies to identify key competitors including global majors, national oil companies, public sector undertakings, regional, and independent suppliers

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.

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
- B2B installers and retailers

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.

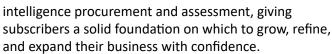## Comprehensive Market Intelligence

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 procurement and assessment, 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 60 years.

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