



# OPPORTUNITIES IN GREASE MARKET

FOCUS: GLOBAL AND REGIONAL

TO BE PUBLISHED: Q3 2024



eKline

## WHAT QUESTIONS SHOULD YOU BE ASKING TO "RE-GREASE YOUR GREASE STRATEGY"?

### Is your market focus aligned with the evolving trends?

- Which are the key regions and sectors that offer higher growth opportunities?
- What are the new emerging opportunities for greases, for example, EVs, Wind – which offer higher value potential

### Is your product portfolio attuned to hardware and raw material changes?

- How are the grease formulations evolving in the backdrop of technology advancements, mega trends, regulatory changes and inflationary trends of raw materials?

### How are the control points shifting in the value chain?

- How is the competitive landscape changing for greases?
- Which stakeholders are key influencers and decision makers? How does this vary by sector?

### Are your supply chains future-proof?

- Captive versus contract manufacturing options at a regional/country level to reduce supply chain costs and address portfolio gaps?
- Are you aware of inorganic growth opportunities?

## BASE YEAR: 2023 | TO BE PUBLISHED: JUNE 2024 | COVERAGE: GLOBAL OVERVIEW & REGIONAL TRENDS

### GLOBAL GREASE MARKET OVERVIEW →

#### MARKET LANDSCAPE

- Which are the key regions/markets for grease consumption and what is the demand outlook?
- Key country market focus: **China, USA, India, Japan, Germany**
- Which are the key end-use application sectors? What are the preferred grease types in key sectors like **Off highway, On-highway, Passenger cars (including BEV), Primary Metals (Steel), Wind?**
- What is the demand segmentation by **thickener and base oil types?**
- What are the key trends, disruptions impacting the grease market?

### GREASE VALUE CHAIN →

#### KEY INFLUENCERS IN THE VALUE CHAIN

- What are the key components of the grease value chain?
- Who are the **key influencers or decision makers?**
- Who are the key suppliers of greases? What is their **area of strength?**
- What kind of influence is exerted by equipment OEMs/suppliers of Tier 1 components like bearings for example?

### GREASE PRODUCT IMPLICATIONS →

#### INTER-PRODUCT COMPETITION LENS

- What is the general the direction of innovation in greases?
- How are the market players reacting to inflationary and regulatory concerns over lithium greases?
- Which types of greases will be preferred by emerging technologies, new equipment?
- How are fill-for-life trends placing extra needs on grease formulations both in automotive and industrial applications?

### CHANGING SUPPLY CHAIN NEEDS →

#### EXPLORE AVENUES FOR ORGANIC/INORGANIC GROWTH

- How does the evolving inter-material competition in greases impact your manufacturing footprint? Will it require any process changes, greenfield investments or new partnerships?
- What are the outsourcing options for grease manufacturing across different countries?
- How are grease manufacturers trying to make their manufacturing process more sustainable? How are digital tools assisting in manufacturing optimization?

*Kline's Grease manufacturers database covers ~250 plants across 23 key countries*

# TABLE OF CONTENTS



## GEOGRAPHIC SCOPE

- Global
- Regional: NA, SA, EMEA, Asia
- Focus Countries for deep-dive
  - USA
  - China
  - Japan
  - India
  - Germany
- Key Sector focus
  - Passenger cars; BEV
  - Off highway: Mining, Construction, Agriculture
  - On-Highway: focusing on heavy & medium trucks (excludes light commercial)
  - Industrial: Primary Metals(Steel) & Wind



## KEY TOPICS

- **QUANTITATIVE INSIGHTS**
  - Market size in KT for 2023 and forecast for 2028
  - Demand segmentation by thickener types and base oil types
  - Demand segmentation by key auto and industrial sectors
  - Market Share of key grease suppliers
  - Database of grease manufacturers in 22 markets
- **QUALITATIVE INSIGHTS**
  - Key trends: Mega trends, sector trends, product and technology trends
  - Grease value chain analysis: influencers and decision makers
  - Key customer needs in key sectors
  - Competition related insights: innovation, marketing etc.

## SUPPORTING DOCUMENTS: KLINE'S GREASE DATABASE

Kline's Grease Manufacturers Database offers a comprehensive list of grease manufacturers based in 23 country market spread across the globe. This database provides information on grease manufacturing facility locations, ownership or affiliations, brands, product specializations based on soap/thickener type and capacity, and recent investments. The information for this database has been sourced from grease publications and supplier knowledge base and has been verified with country experts.

### MARKET COVERAGE ~ 80% OF GLOBAL GREASE PRODUCTION HUBS

- Australia
- Brazil
- Canada
- China
- Czech Republic
- Egypt
- France
- Germany
- India
- Indonesia
- Italy
- Japan
- Mexico
- Nigeria
- Poland
- South Africa
- South Korea
- Spain
- Thailand
- Turkey
- United Arab Emirates
- United Kingdom
- United States

- Competitive intelligence on individual manufacturing plants, including:
  - Up-to-date capacity estimates
  - Updates on changes in capacity and ownership
  - Product specialization (grease thickener type)

- Profiles of around 300 grease manufacturers by country market, including:
  - Global suppliers
  - Multinational companies (MNCs)
  - National oil companies (NOCs)
  - Local/Independent manufacturers



**WE LOOK FORWARD  
TO HEARING FROM  
YOU!**

Contact us at [energy@klinegroup.com](mailto:energy@klinegroup.com)