



OPPORTUNITIES IN GREASE MARKET

FOCUS: GLOBAL AND REGIONAL

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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 like 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 it vary by sector?

Is 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), Metals, Transportation Equipment Manufacturing?**
- 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 grease value chain?
- Who are the **key influencers or decision makers?**
- Who are the key suppliers of greases? What is their **areas of strength?**
- What kind of influence is exerted by equipment OEMs/suppliers of Tier 1 components like bearings etc.?

GREASE PRODUCT IMPLICATIONS →

INTER-PRODUCT COMPETITION LENS

- What is in 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 is 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 digital tools are assisting in manufacturing optimization ?

Kline's Grease manufacturers database covers ~300 plants across 23 key countries

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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
 - Transportation Equipment Manufacturing & Primary Metals



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
- **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:
 - Multinational companies (MNCs)
 - National oil companies (NOCs)
 - Tier 2 manufacturers
 - Contract/Toll manufacturers



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

Contact us at energy@klinegroup.com