

Global Lubricants Service (GLS)

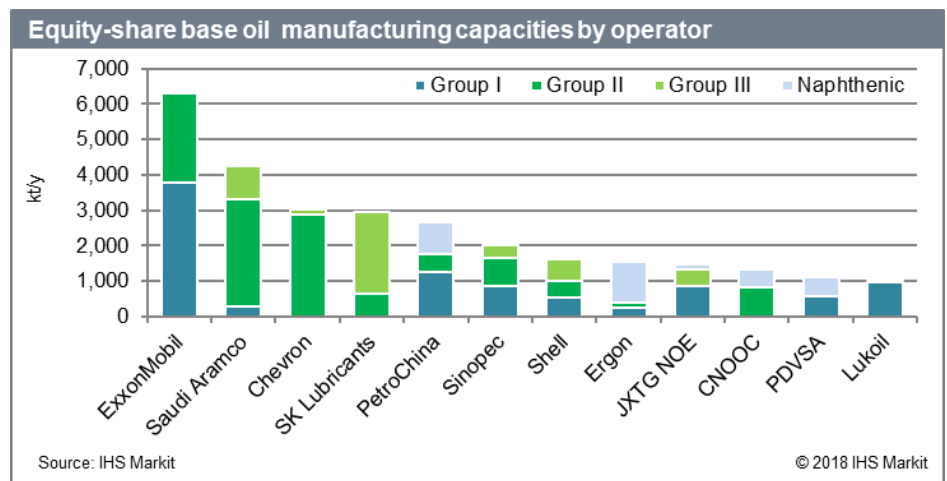
Extend your reach with a 360-degree view of the global lubricants industry

Key Research Questions

- How is the lubricants sector evolving, and how can I guide our lubricants-focused strategic planning to navigate the changing industry landscape?
- What are the strategies of major suppliers in the market for base oils and lubricants, and how is my company positioned relative to key competitors?
- What key market trends are emerging, and how do I gain the visibility to identify the best opportunities for new investments and/or partnerships?
- How is the base oil and lubricants supply landscape evolving, and what associated asset changes and important investment decisions are shaping the industry?

The global lubricants market is as competitive as ever, with an abundance of well-diversified global, regional, and independent lubricant, base oil and additive suppliers. The Global Lubricants Service is designed to provide operators across the lubricants value chain with visibility in this rapidly evolving industry sector, supported by convenient access to timely data and unique insights to facilitate strategic planning initiatives and support effective competitive positioning.

The Global Lubricants Service provides reliable data and in-depth analysis on all aspects of the lubricants industry across major markets in each of the key operating regions. The service offers an extensive library of country and company profiles, overview presentations, industry trend reports and statistical data collections, all updated on a regular basis. Our integrated approach offers you the visibility to respond swiftly to evolving industry dynamics, and ensures that your strategic and operational decisions are based on the most current and robust data available.



How do our clients use the Global Lubricants Service?

STRATEGIC & BUSINESS PLANNING

- Assess current market evolution and remain abreast of fundamentals in the base oil and finished lubricant segments
- Evaluate detailed information on base oil capacities and anticipated investments, base oil prices and margins, and finished lubricant market shares

COMPETITIVE POSITIONING

- Identify major suppliers' strategic choices and understand how these affect their businesses
- Analyze major operators' performance, supply positions, industry rankings and marketing strategies in key regions of interest

MARKET-SPECIFIC INSIGHT

- Understand the dynamics of key lubricant markets and determine which geographies and segments to target for business growth
- Focus on the sector-specific economic and regulatory context, as well as recent trends and outlook for base oil manufacturing assets, trade, and supply/demand balances

Trend Reports and Statistical Updates



Quarterly, biannual and annual trend reports and statistical updates provide the latest data and information on industry developments across the base oil and lubricants value chain. Key deliverables include:

- Industry trend updates
- Quarterly base oil margin updates
- World base oil manufacturing capacities overview
- World base oil manufacturing capacities survey
- Competitor positioning overview
- Finished lubricants market share database
- Global historical lubricants demand database

Country Profiles



Access an extensive library of country profiles, covering markets selected as a function of their scale or growth potential. GLS country profiles are typically updated at 12-36 month intervals.

- Argentina
- Australia
- Brazil
- Canada
- China
- Colombia
- France
- Germany
- India
- Indonesia
- Italy
- Japan
- Kazakhstan*
- Malaysia
- Mexico
- Netherlands
- Pakistan
- Peru
- Philippines
- Poland
- Russia
- Saudi Arabia*
- South Africa
- South Korea
- Spain
- Thailand
- Turkey
- Ukraine*
- United Kingdom
- USA
- Vietnam

** New in 2018/2019.*

Competitor Profiles



Keep abreast of the strategies of key players operating in the global lubricant markets. GLS company profiles are typically updated on a 24-36 month cycle.

- BP
- Chevron
- ExxonMobil
- Fuchs
- Idemitsu
- JX Nippon Oil & Energy
- Lukoil*
- Pertamina
- PetroChina*
- Petronas
- Shell
- Sinopec*
- SK Lubricants
- Total
- Valvoline

** New in 2018/2019.*

Optional Add-on Resources



Global Lubricants Demand Model (LDM): The LDM, part of the IHS Markit downstream modeling suite, is an Excel-based forecasting model that generates detailed in-depth lubricants demand forecasts based on a bottom-up approach. Complementing the Global Lubricants Service, the LDM leverages IHS Markit's extensive database of historical structural data inputs and integrated forecasting assumptions to generate bottom-up annual demand projections by product type through 2040 at global, regional and country level. The model enables users to rapidly assess the impact of numerous structural factors, such as the displacement of lubricants demand associated with electric vehicle penetration. The LDM is available as an add-on to the Global Lubricants Service, via an annual user license to the full model or access to the output data from the model.

IHS Markit Connect

Access your IHS Markit lubricants research & analysis anytime – in the office or on the go – through IHS Markit Connect, our innovative business and market intelligence platform. This portal empowers you to tap into our wide range of analysis on key industry sectors such as energy, chemicals, and automotive production as well as economics, and to customize your experience to focus on addressing your specific business needs. IHS Markit Connect uses advanced navigation, sophisticated content tagging and notifications, and interactive data visualization to optimize the ways you can access, query, visualize, and analyze research and data from energy and related industry sectors.

IHS Markit Customer Care

- Americas: +1 800 447 2273
- Europe, Middle East, and Africa: +44 (0) 1344 328 300
- Asia and the Pacific Rim: +604 291 3600

CustomerCare@ihsmarkit.com

About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth. For more information visit ihsmarkit.com