

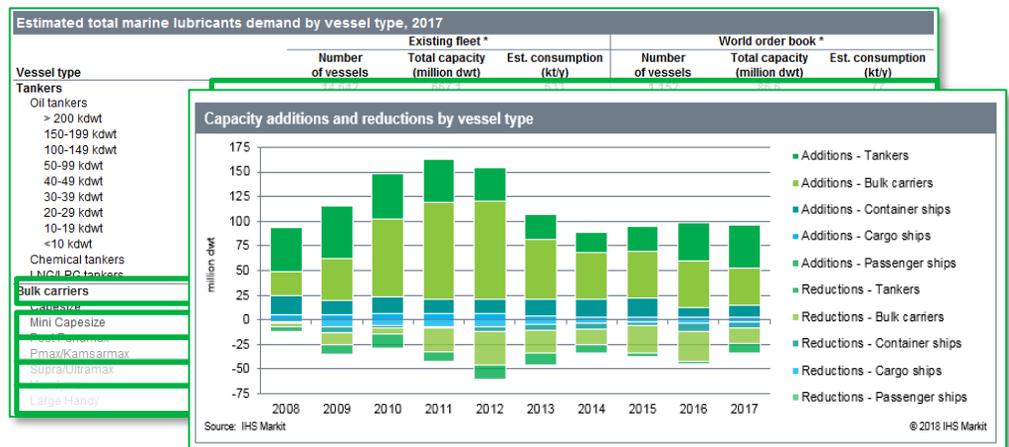
International Marine Lubricants

Understand the Deep Sea Marine Lubricants Sector

The **International Marine Lubricants (IML) report** – now in its seventh edition – provides in-depth analysis and data on the recent trends and outlook for the merchant shipping sector, international seaborne trade, deep sea marine lubricants demand, and the strategies of major lubricant suppliers.

Providing Answers to Key Commercial Questions

- What regulatory, structural, and technical factors are driving the deep sea marine lubricants sector now and in the long-term?
- What opportunities will arise from changes in the composition of the global shipping fleet, international trade, and regional port traffic flows?
- What is the breakdown of lubricants demand by vessel, product type, and region?
- How are competitors responding to the entrenched difficulties of the operating environment and the major challenges that lie ahead?



How do our clients use the International Marine Lubricants report?

Strategic & Business Planning

- Assess current market trends and stay informed about regulatory and technical drivers and their anticipated impacts
- Use independently developed international marine lubricants demand forecasts for internal benchmarking

Market-Specific Insight

- Understand the impact of shipping industry dynamics on demand for deep sea marine lubricants
- Evaluate key data on fleet characteristics, seaborne trade, port traffic, and relevant environmental regulations

Competitive Positioning

- Analyze the evolution of major operators' market positions, strategy, product development, and delivery capabilities
- Identify factors in the operating environment that are shaping the strategies of major suppliers

Key Differentiators

- **Proven methodology and trusted experts:** IHS Markit has been analyzing the international marine lubricants industry for more than a decade, advising leading producers and consumers in the market
- **Built on unrivaled maritime industry expertise:** Analysis is driven by proprietary data from IHS Markit Maritime, the leading source for shipping industry statistics
- **Integrated IHS Markit perspective on International Marine Organization bunker fuel specifications for 2020** and discussion of the ramifications for the deep-sea marine lubricant sector and its customers
- **Incorporating the full lubricants industry perspective:** the IML report is part of the IHS Markit comprehensive lubricants knowledge base, fully aligned with our Global Lubricants Suite

Content Delivered

The 2018 IML report is delivered as a written report in PDF format, accompanied by an IML Data Workbook in MS Excel format. It incorporates full-year 2017 maritime statistics, with forecasts through 2022. Covered content includes:

Market context – recent trends and outlook

- Commercial shipping fleets
- Capacity additions and reductions
- World order books
- Evolution of freight/charter rates
- Seaborne trade by product type
- Port traffic and ship movements by vessel type
- Environmental regulation

Competitive environment

- Overview of current context
- Technology and product trends
- Logistics and delivery capabilities
- Sales volumes and market shares

The market for deep sea marine lubricants

- Fleet structure and trends in vessel size
- Fleet structure by vessel type and age profile
- Evolution of merchant shipping capacity, seaborne trade, and bunker fuel demand
- Deep sea marine lubricants demand

Key operators

Relative market positions, strategy, product development, marketing operators, technical support programs, and global and regional delivery capabilities

- Castrol
- Chevron
- ExxonMobil
- Gulf Oil
- Lukoil
- Shell
- Total Lubmarine

A Critical Time for the Global Shipping Industry

The global shipping industry is entering an even more tumultuous period than it has already seen over the past few years. The International Marine Organization is set to introduce new sulfur limits for marine fuel on the high seas from 2020, heralding a period of heightened uncertainty for operators across the international shipping, fuels refining, and deep-sea marine lubricant segments.

These developments are occurring in an already-challenging context: evolving engine technologies and new operating and environmental norms have created a need for more rapid updating of marine lubricant product ranges and higher levels of client support. At the same time, the shipping industry remains highly cost-conscious: despite a modest recovery in shipping demand, overcapacity continues to hold down shipping and charter rates.

The IML report is designed to help users to navigate this increasingly complex world by providing an assessment of the recent trends and outlook for the global merchant shipping fleet, international seaborne trade flows, port traffic, and the regulatory requirements that are driving deep sea marine lubricants demand. It also provides in-depth discussion of the product strategies, delivery capabilities and relative market positions of the major deep-sea marine lubricants marketers and would-be participants.

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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