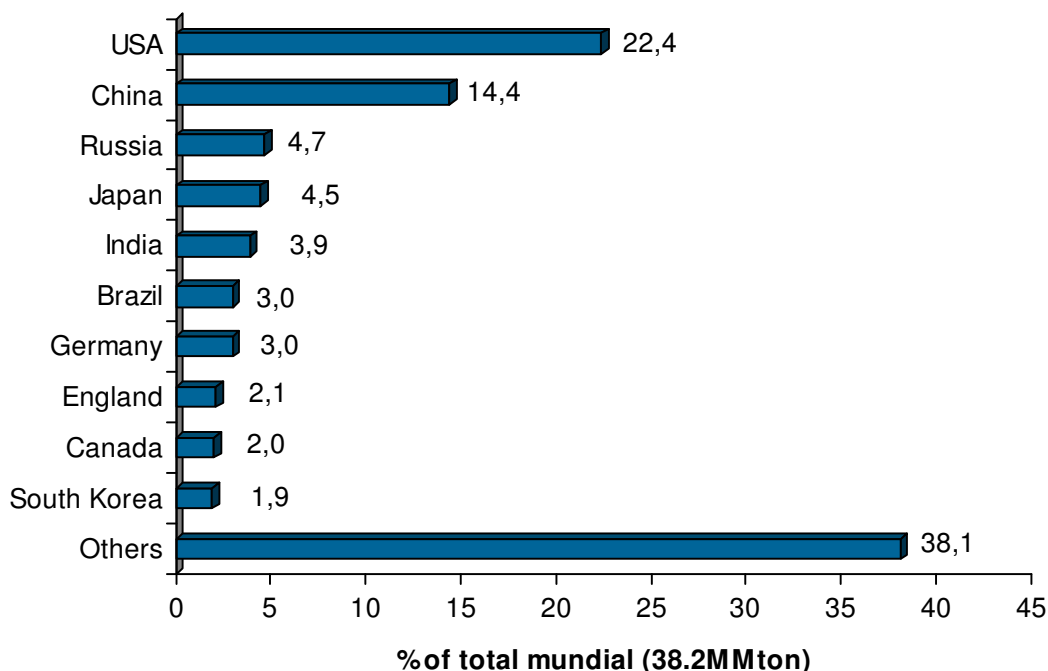
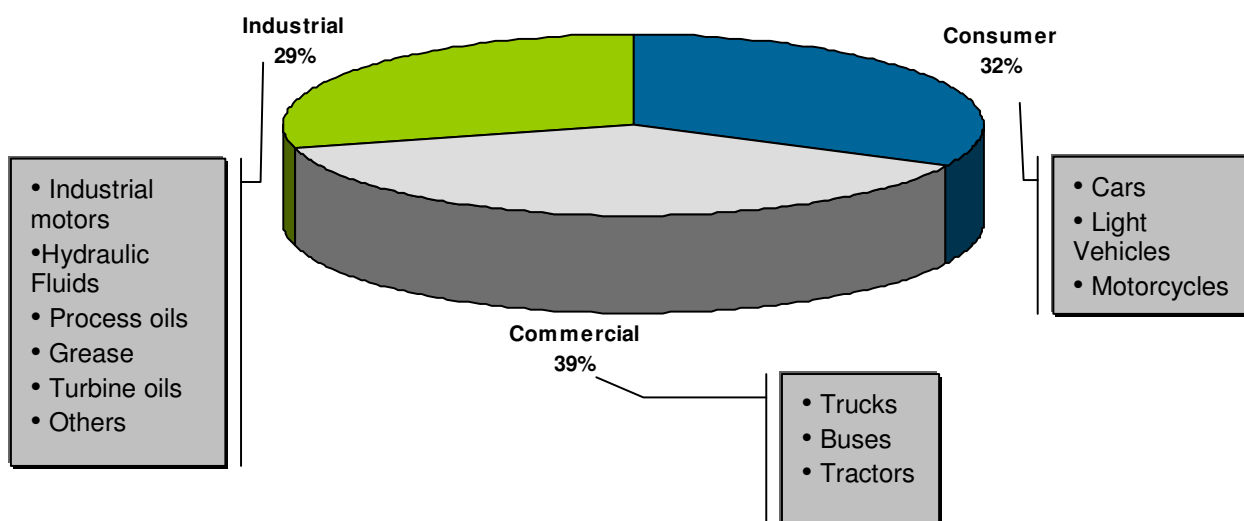


Brazil Lubricants 2008 – Major Findings

Brazil is the sixth global lubricants market in the world (in volume)



Brazilian market segmentation

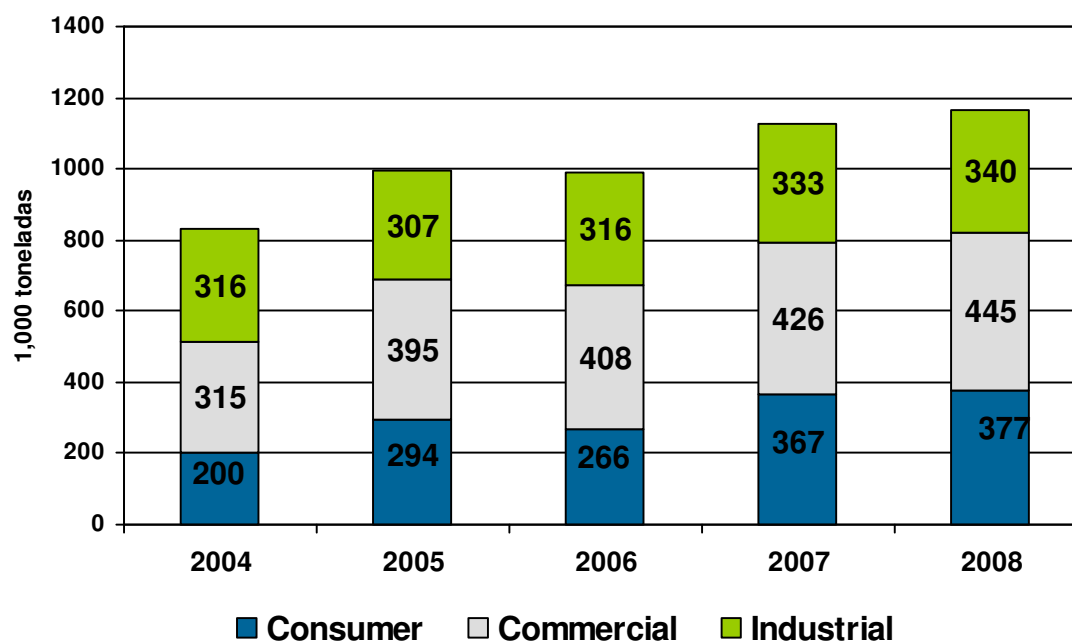


Brazil Lubricants 2008 – Major Findings

ESTIMATED DEMAND FOR FINISHED LUBRICANTS IN BRAZIL BY LUBRICANT SEGMENT, 2008

Lubricant segment	Kilotonnes	% Of total volume
Commercial automotive	445.0	38
Industrial oils and fluids	340.1	30
Consumer automotive	377.4	32
Total	1,162.5	100

Brazilian Lubricants Market, 2004-08



Commercial Automotive Lubricants

ESTIMATED DEMAND FOR COMMERCIAL AUTOMOTIVE LUBRICANTS, 2008

Lubricant	Kilotonnes	% Of total volume
HDMO	365.0	82
Transmission fluid	33.1	7
Gear oil	27.5	6
Grease	19.3	4
Total	445.0	100

ESTIMATED DEMAND FOR HDMO IN BRAZIL BY VISCOSITY GRADE, 2008

Viscosity grade	Kilotonnes	% Of total volume
MONOGRADE		
40	136.0	37
30	6.8	2
Total	142.8	39
MULTIGRADE		
15W-40	207.0	57
Others	15.3	4
Total	222.3	61
TOTAL	365.0	100

Consumer Automotive Lubricants

ESTIMATED DEMAND FOR CONSUMER AUTOMOTIVE LUBRICANTS, 2008

Lubricant	Kilotonnes	% Of total volume
PCMO	277.9	74
Gear oil	24.2	6
2T/4T	39.5	10
Transmission fluid	19.7	5
Grease	16.0	4
Total	377.4	100

ESTIMATED DEMAND FOR PCMO BY VISCOSITY GRADE, 2008

Viscosity grade	Kilotonnes	% Of total
MULTIGRADE		
20W-40/20W-50	75.6	27
15W-50/15W-40	119.7	43
25W-40/25W-50	25.3	9
5W-40/5W-50	10.1	4
10W-40	13.0	5
5W-30	3.3	1
Total	247.0	89
MONOGRADE		
40	19.1	7
30	11.8	4
Total	30.8	11
TOTAL	277.9	100

Industrial Lubricants

ESTIMATED DEMAND FOR GENERAL INDUSTRIAL LUBRICANTS AND GREASES IN BRAZIL BY LUBRICANT TYPE, 2008

Category/grade/type	Kilotonnes	% Of total volume
HYDRAULIC FLUID	99.2	29
AW 32	15.2	4
AW 46	9.0	3
AW 68	61.1	18
Other mineral	3.2	1
Fire resistant	10.7	3
COMPRESSOR OIL	5.8	2
REFRIGERATION OIL	5.8	2
TURBINE & CIRCULATING OIL	22.0	6
ISO 32	6.9	2
ISO 46	6.9	2
ISO 68	7.7	2
Synthetic	0.4	0
INDUSTRIAL GEAR OIL	16.0	5
ISO 68	1.3	0
ISO 150	3.1	1
ISO 220	3.5	1
ISO 320	3.5	1
ISO 460	3.1	1
Other	1.5	0
OTHER INDUSTRIAL	155.9	46
INDUSTRIAL GREASES	35.6	10
Total	340.1	100

Factor de Solução / The Kline Group

O grupo Kline é uma organização de consultoria internacional com 45 anos de atuação, sediada nos EUA e com escritórios em todos os continentes. Atua na América Latina através de sua filiada Factor de Solução Consultoria, assistindo empresas Brasileiras e Sul Americanas no mapeamento e endereçamento de problemas práticos em estratégias de mercado e de posicionamento competitivo, programas de diversificação e de internacionalização, com foco nos segmentos químicos, ciências da vida, energia e cosméticos.

Se desejar maiores informações sobre o conteúdo deste documento ou dos serviços que Factor/ The Kline Group oferece, por favor entre em contato:

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