



Global Base Oils Service

Optimize your long-term strategy and tailor medium-term operational decisions to maximize profitability

The global base oil market is evolving faster than ever, driven by technological, regulatory, and competitive forces. Whether a base oil producer or consumer, securing your competitive position hinges on having both a long-term, structural perspective and maintaining insight into shorter-term market dynamics.

IHS Markit's Global Base Oils Service (GBOS) provides unparalleled depth and comprehensiveness of analysis:

- **2040 forecasting horizon** for supply/demand/trade and pricing
- **Nine regions of analysis** to provide a high degree of granularity
- **Includes API Group I, Group II, Group III, Group IV, and Naphthenic base oils**
- **Annual, quarterly, and monthly updates** ensure critical timeliness
- **Includes manufacturer profiles** accessible to all subscribers
- **10 reference configurations** for base oil margin assessment: USGC Groups I & II, Northwest Europe Group I, Southeast Asia Groups I & II, Northeast Asia Groups I, II, & III, Middle East Groups I & III
- **Plant-level production capacities** and region-level production data

Market analysis, procurement, strategic development, and financial analysis functions will all benefit from the comprehensive coverage available from GBOS, using it to:

Determine Long-Term Investment and Regional Strategies

- Understand current and future centers of demand
- Evaluate the outlook for global and regional supply/demand balances and pricing
- Consider new regional markets and base oil groups

Assess Competitive Positioning:

- Analyze base oil manufacturers' production assets and capacities
- Understand major suppliers' strategic choices and how they are positioning themselves for the future
- Benchmark against reference configuration manufacturing economics

Optimize Procurement and Marketing Strategy:

- Monitor base oil margins monthly to understand fluctuations in producer economics
- Maintain awareness of market pricing and how it may evolve
- Track capacity changes and resulting market impacts

Insights for an Evolving Market

- Advancing technological and regulatory requirements are driving new lubricant quality needs
- New countries and regions are emerging as important centers of production
- Wider industry developments – such as the IMO 2020 fuel specification change – are altering refining economics and disrupting markets
- Lubricant formulators are adjusting operations in response to changing base oil supply dynamics between API Groups



Service Features

Global Base Oils Service deliverables provide reliable data and in-depth analysis on all aspects of the base oil industry across nine global operating regions. Analysis is grounded in a comprehensive modelling approach, capturing global base oil supply and demand dynamics. GBOS, part of our full ecosystem of downstream offerings, is highly complementary to the Global Lubricants Service and closely linked to the Lubricants Demand Model.

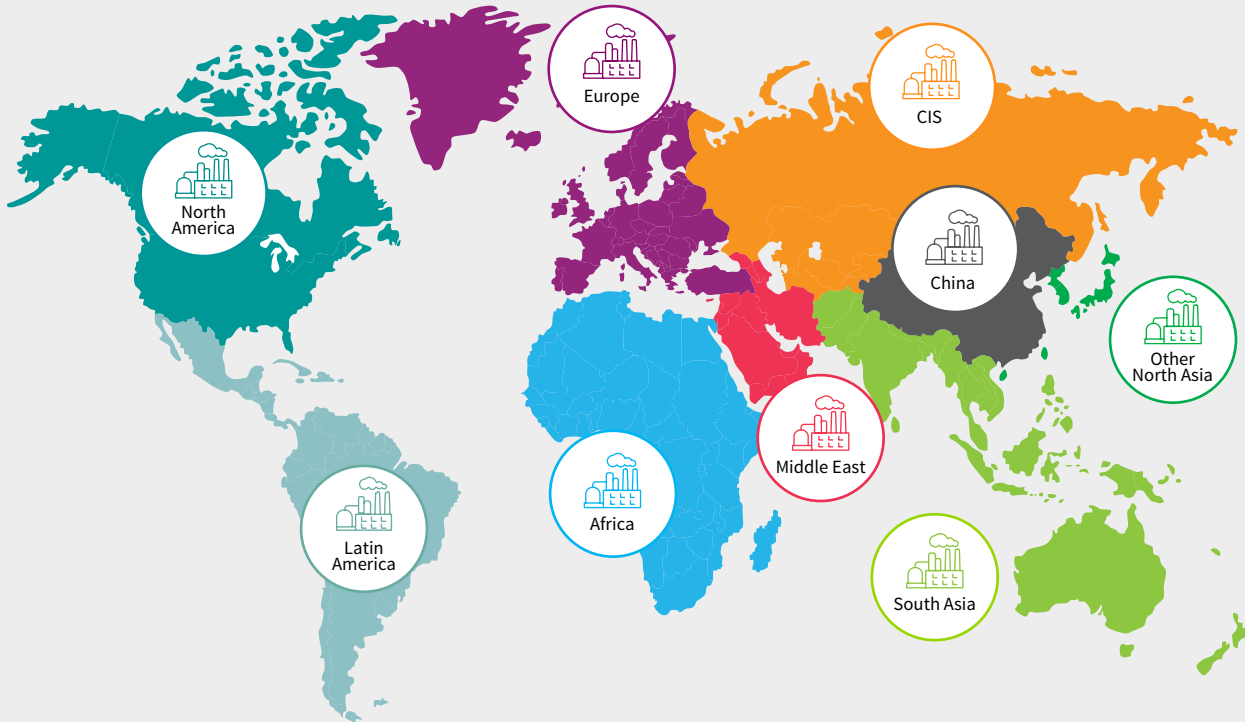
	Global Base Oils Service	Global Lubricants Service	Frequency
Base Oil Supply/Demand Balance Outlook	●		Annual
Base Oil Manufacturer Profiles	●		Annual
Base Oil Price Outlook	●		Quarterly
Monthly Base Oil Margin Updates	●		Monthly
World Base Oil Capacity Investment Updates	●	●	Ad hoc
World Base Oil Manufacturing Capacities Overview	●	●	Annual
World Base Oil Manufacturing Capacities Survey	●	●	Annual
Quarterly Base Oil Margin Updates	●	●	Quarterly
Lubricants Competitor Positioning Overview		●	Annual
Lubricants Market Share Database		●	Annual
Lubricants Demand Database		●	Periodic
Lubricants Country Profiles		●	Periodic
Lubricants Company Profiles		●	Periodic
Lubricants Industry Trend Updates		●	Semi-Annual





Granularity and Scope of Coverage

Coverage is broken down into nine separate geographic areas, allowing clients to focus on specific regions of interest, as well as the wider global context.



All base oil groups

Group I

Group II

Group III

Group IV

Naphthenic

10 Reference configurations

US Gulf Coast
Groups I & II

Northwest Europe
Group I

Southeast Asia
Groups I & II

Northeast Asia
Groups I, II & III

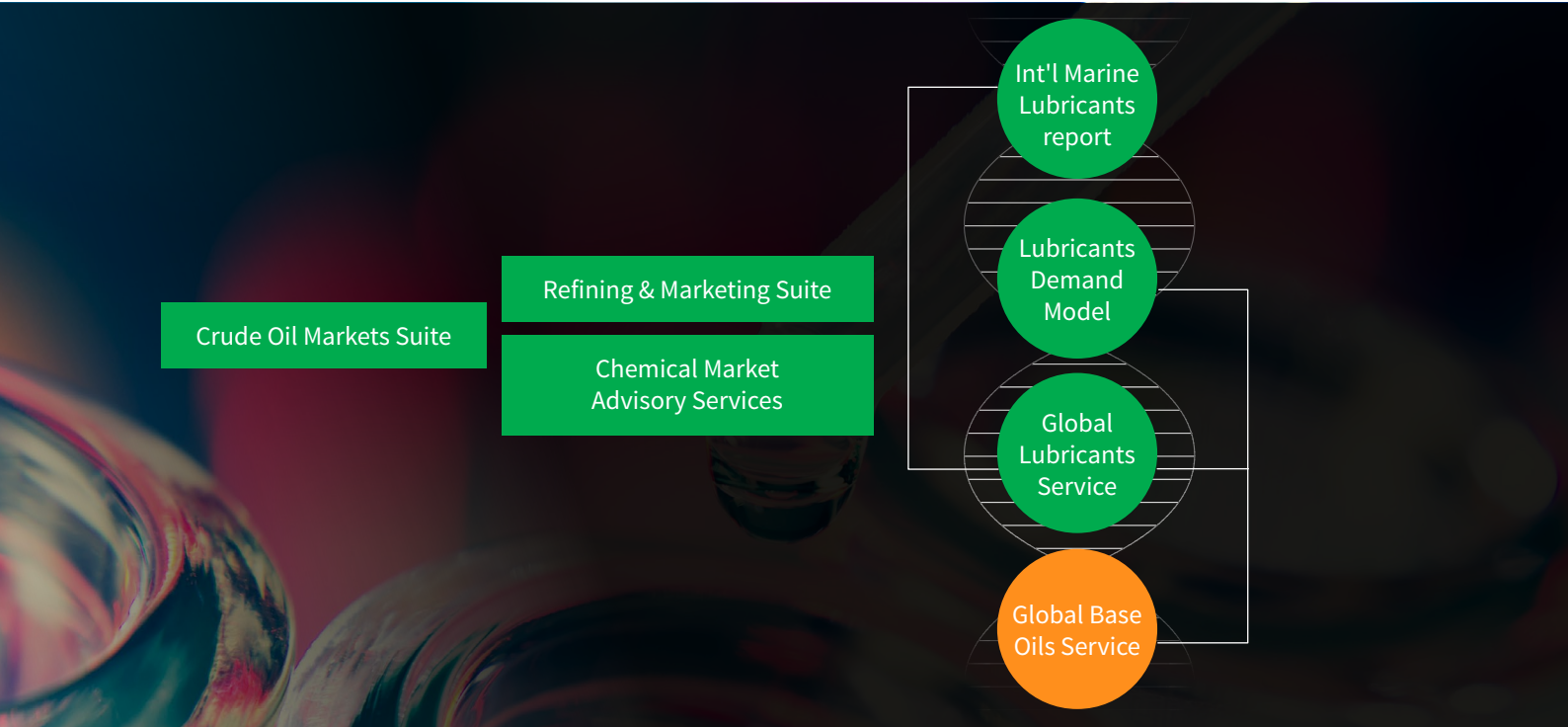
Middle East
Groups I & III





Integrated Value Chain of Offerings

Analysis from the Global Base Oils Service is informed by IHS Markit's expertise across the entire lubricants and downstream value chain. GBOS clients who subscribe to related services – and particularly the Refining & Marketing Suite and the Global Lubricants Service – will find that data and analysis are fully integrated.



For more information www.ihsmarkit.com

CUSTOMER CARE

NORTH AND SOUTH AMERICA

T +1 800 447 2273
+1 303 858 6187 (Outside US/Canada)

EUROPE, MIDDLE EAST AND AFRICA

T +44 1344 328 300

ASIA PACIFIC

T +604 291 3600

E CustomerCare@ihsmarkit.com

About IHS Markit

IHS Markit (NYSE: INFO) is a world leader in critical information, analytics and expertise to forge 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 business and government customers, including 80 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.