

Marine Lubricants Demand Trends in the Middle East

Opportunities, Drivers &
Strategic Outlook



petrogulf
marine



Why the Middle East Matters



Strategic global shipping corridor (Hormuz, Suez, Red Sea)



High concentration of:

Commercial shipping fleets

Offshore oil & gas vessels

Port operations & bunkering hubs



Increasing focus on engine reliability, efficiency & compliance



Market Impact:

Sustained demand for high-performance, spec-compliant marine lubricants

Key Demand Drivers

1. Growth in Maritime Trade

Rising container, tanker & bulk carrier traffic

Expansion of ports in KSA, UAE, Oman, Qatar

The Petrogulf relevance:
Higher operating hours
→ consistent demand for
Cylinder Oils & TPEOs

2. Offshore Energy Activity

Offshore rigs, FPSOs, OSVs & support vessels

Continuous operation under severe conditions

The Petrogulf relevance:
Demand for: Marine
System Oils, Marine
Hydraulic Oils, Marine
Compressor Oils

3. Fleet Modernization

Newer crosshead & auxiliary engines

OEM-driven lubrication requirements

The Petrogulf relevance:
Need for OEM-aligned
Cylinder Oils & TPEOs

Regulatory Impact

Regulations Driving Lubricant Demand

- ▶ IMO 2020 sulfur cap
- ▶ MARPOL environmental regulations
- ▶ Gradual adoption of EAL requirements in ports

Impact on Marine Lubricants

- ▶ Higher BN accuracy
- ▶ Cleaner piston & liner performance
- ▶ Advanced additive chemistry

The Petrogulf alignment:

Formulations designed to meet modern fuel & emission realities



Cylinder Oil Demand

5040 / 5070



CYLINDER OIL 5040
(BN 40)



OPTIMIZED FOR
COMPLIANT FUELS



CLEANER PISTON &
LINER
PERFORMANCE



CYLINDER OIL 5070
(BN 70)



HIGH SULFUR FUEL
OPERATIONS



STRONG ACID
NEUTRALIZATION

Engine Evolution Driving Demand for Cat II Engine Oils

- ▶ **Post-IMO 2020 engine design has made Cat II-compatible lubrication essential**
- **Multi-fuel engine operation (MAN / WinGD)**
Modern engines operate continuously on Cat II, VLSFO and ULSFO fuels
- **Adaptive lubrication systems**
OEM systems (e.g. MAN Alpha ACC) require precisely balanced BN oils
- **Cold corrosion control**
Fuel variability drives demand for intermediate BN oils with enhanced detergency
- **Updated engine hardware**
New liner temperatures and ring packs require higher cleanliness and thermal stability
- ▶ **Demand Outcome:**
Shift toward Cat II-compatible engine oils supporting fuel flexibility and OEM compliance

TPEO Demand

3030 / 4030

TPEO 3030

Moderate
auxiliary
engine loads

Reliable
detergency

TPEO 4030

Higher load
operations

Enhanced
piston
cleanliness

System & Specialty Oils for supporting systems & equipment

Petrogulf Portfolio Alignment

- ▶ **Petrogulf Marine System Oils**
→ Crankcase & bearing lubrication
- ▶ **Petrogulf Marine Hydraulic Oils**
→ Winches, cranes, steering gear
- ▶ **Petrogulf Marine Compressor Oils**
→ Air & gas compression systems

What Marine Customers Expect Today

Key Shift:
Lubricants are now a performance and risk-management decision

OEM-aligned formulations

Consistent batch-to-batch quality

Reliable regional supply

Technical guidance & product confidence

Compliance without sacrificing engine protection

Sustainability Trends

Sustainability Is No Longer Optional

- Stricter port authority oversight
- Environmental accountability from shipowners

Lubricant Expectations

- Reduced oil consumption
- Cleaner engines
- Longer service life

The Petrogulf Advantage

- Optimized formulations for:
 - Lower deposit formation
 - Improved engine cleanliness
 - Operational efficiency

Supply Chain Expectations

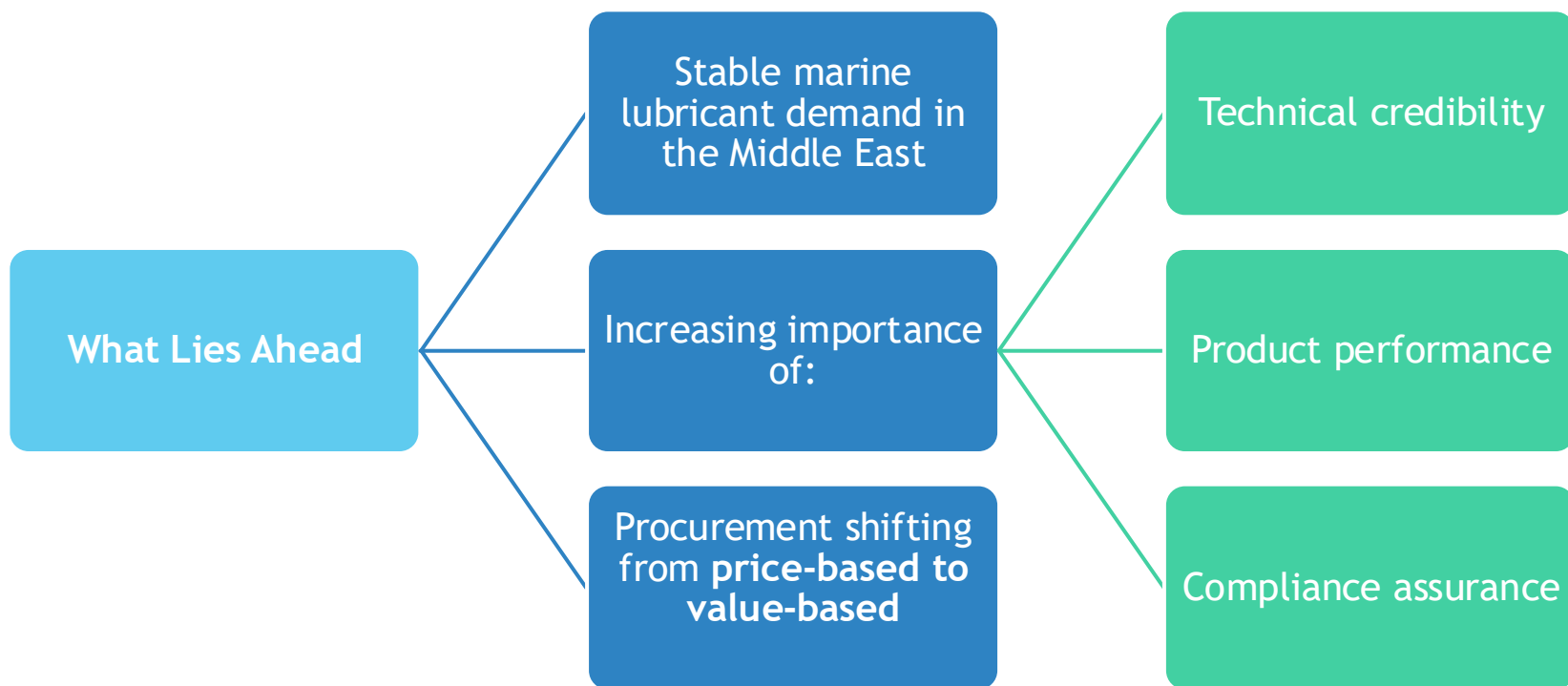
What the Market Expects from Marine Lubricant Suppliers

- ▶ Regional manufacturing & blending
- ▶ Short lead times
- ▶ Multi-port delivery capability
- ▶ Flexible packaging (drums, IBCs, bulk)

The Petrogulf Strength

Reliable supply supporting
uninterrupted marine operations

Strategic Outlook



Market Winners:
Suppliers combining performance, compliance & supply reliability

Powering Marine Performance in the Middle East

Petrogulf Marine Lubricants

Engineered for demanding marine operations, delivered with regional expertise and global standards.

 Middle East |  Global Reach

 www.petrogulfmarine.com

