

Built to Evolve

Shaping What's to Come in the Lubricants Industry

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Our industry has always made things move.
Now it's time to move forward—together.

Our Industry's Invisible Impact





Our Industry Is Changing—and Fast



**1.5M EVs sold
in U.S. in 2024.**

**Electrification
and New Mobility**

([S&P Global](#))



**NHTSA CAFE
Standards will
require a fleet
average 50.4
miles per gallon
by 2031.**

**Regulatory Pressure
and Sustainability**

([NHTSA](#))

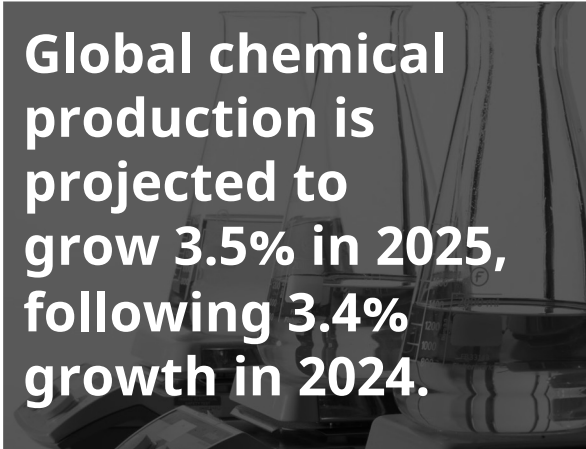


**The global
automotive AI
market is set to
grow from \$4.29B
in 2024 to \$14.92B
in 2030.**

**AI and Digital
Transformations**

([Grand View Research](#))

We're Built to Evolve



Global chemical production is projected to grow 3.5% in 2025, following 3.4% growth in 2024.

(ACC)

Driving Continued Global Growth



More than 70% of the world's top 100 chemical producers have pledged carbon neutrality by 2050.

(Reuters)

Ambitious Industry Commitments



The Automotive industry is one of the top industries investing in digital transformation.

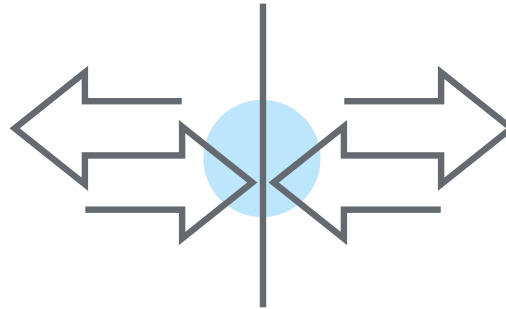
(ABI Research)

Digital Transformation and Innovation

Our industry is well positioned to meet the moment throughout the Americas and beyond.

Margin and Market Pressures

Tariffs | Rising Costs
Standardization
Supply Chain Challenges
Regulatory Complexity



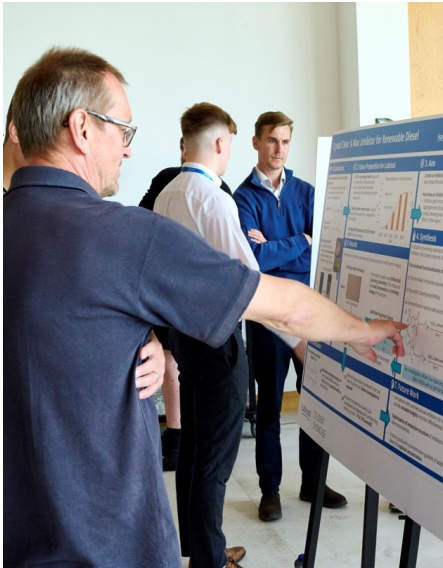
Innovation
Differentiation
Talent Investment
Bold Ideas



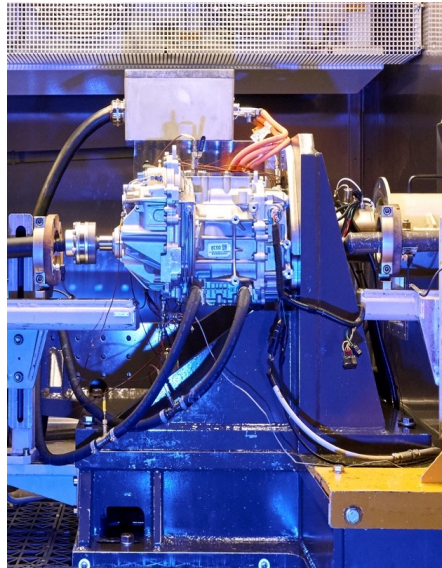
So, What's Next?

It's time to evolve by embracing new skill sets, challenging cultural norms, and investing in what matters most.

Embrace New Skill Sets



**Cross-Disciplinary
Thinking**



**Data
Fluency**



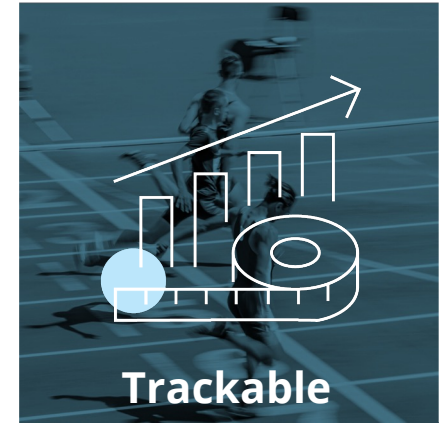
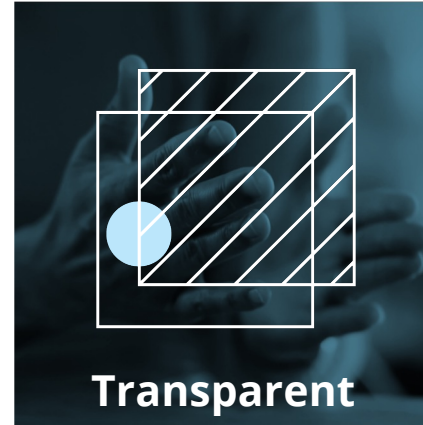
**Customer
Storytelling**



**Talent
Development**

Making Meaningful, Sustainable Progress

Sustainable change must be:



Proof of Progress

The Lubrizol Difference



Chemistry

Applications Knowledge

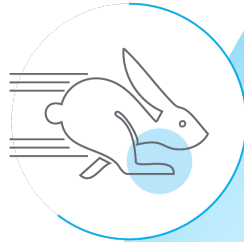
Measurements and Approvals



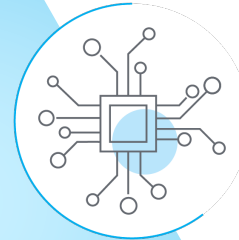
For more information:

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More agile
moving faster,
learning quicker



More digital
harnessing data, AI,
and automation



More inclusive
diverse teams drive
better ideas



More mission-driven
purpose attracts the
next generation



The risk of over standardization:
Uniformity may serve regulations—but it can dull differentiation.

The call to reinvest:



The Path Forward



Purpose



Sustainability



Progress



Thank You

Q&A and Discussion

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