

## Draft Minutes

### American Petroleum Institute LUBRICANTS COMMITTEE Standards Meeting November 11, 2002

Omni Hotel Riverway—Houston, TX

Fran Lockwood, Chair  
West Alexander, Vice Chair

#### OPENING AND INTRODUCTIONS

**Registration of Attendees:** API Lubricants Committee Vice Chair West Alexander (ChevronTexaco) called the meeting to order, asked attendees to introduce themselves, and circulated a sign-in sheet (Attachment 1) for meeting attendees. Mr. Alexander chaired the meeting on behalf of Chair Fran Lockwood, who could not attend because of a pressing commitment.

**Approval of Minutes:** Mr. Alexander made a motion for acceptance of the minutes from the May 23, 2002 Lubricants Committee meeting. Several members seconded the motion, and the committee approved the minutes without changes.

**Changes in Membership:** Mr. Alexander announced several changes to committee membership:

- Ralph Cherrillo (Shell) has assumed a new position in Diesel Fuel Technology at Shell and must step away from his lubricants-related committee work. This includes his Chairmanship of the BOI/VGRA Task Force. Mr. Alexander thanked Mr. Cherrillo for his years of service to the Lubricants Committee and industry's lubricants activities.
- Jim Newsom will now represent Shell following Shell's recent acquisition of Pennzoil/Quaker State.
- Steve Tarbox will represent the newly merged ConocoPhillips. Mr. Alexander thanked Larry Norris for his years of service on behalf of Conoco.
- Mark Matson will represent Marathon.
- Mike Smith will represent Motiva.

#### PASSENGER CAR ENGINE OILS

**ILSAC/Oil GF-4 Developments—Status of IIIG:** Mike McMillan (GM) reported on the status of the Sequence IIIG Engine Test (see Attachment 2). He believed the test should be in control and capable of generating needed data by the end of this year. He estimated 1Q 2003 for IIIG matrix test readiness.

**ILSAC Response to API:** Committee members discussed the November 8, 2002 response from ILSAC/Oil Committee Chair Bob Olree (GM) to a November 7, 2002 e-mail message from API Lubricants Committee Chair Fran Lockwood. Both messages are provided under Attachment 3.

Much of the discussion centered on the IIIG success factors listed in the November 7 letter. ILSAC believes that including these factors in the 0.08 phosphorus limit discussion is not necessary because they will be considered during the ASTM Sequence IIIG development process. ILSAC also expressed concerns about the Sequence VE and IIIE correlations, questioning whether they are achievable given the confounding effects of the change from leaded to unleaded fuels. Lubricants Committee members reaffirmed their expectation that the success factors would be met.

Lubricants Committee members also raised the issue of category life. Mr. McMillan stated that ILSAC is satisfied with the way category life is handled in the November 7 message.

**ILSAC/Oil Committee Status Report:** Cliff Venier (Shell) briefed the Committee on the status of ILSAC/Oil. The current timeline (Attachment 4) projects a GF-4 first use date of March 2004. This date assumes ILSAC/Oil Committee approval of the category specifications by June 2003 and a first use licensing date 9 months later. After some discussion among Committee members about the accuracy of the timeline—particularly the January 2003 start date for matrix testing, Mr. Venier and Mr. McMillan agreed that the timeline needs to be adjusted. Mr. McMillan estimated that matrix testing could begin by late first quarter 2003. Mr. Venier agreed to adjust the timeline accordingly.

Mr. Venier and Lubricants Committee members raised other issues facing ILSAC/Oil:

- No alternatives have been suggested for the IIIG if it cannot be approved. Committee members noted that the IIIG is the keystone to GF-4. Backward compatibility is also dependent on the test.
- Reference oils for the matrix tests need to be selected, blended and supplied to the test labs before matrix testing can begin.
- The IIIG test sponsor (GM) needs to comment on the BOI/VGRA Task Force's recommendation that the Sequence IIIF viscosity read across guidelines be extended to the Sequence IIIG. Mr. McMillan agreed to raise the issue within GM and provide an answer quickly.

**Action Item: Mike McMillan (GM) will ask his GM colleagues to review and comment on the BOI/VGRA's recommendation that Sequence IIIF VGRA guidelines be extended to the Sequence IIIG.**

**ILSAC/Oil Process—Appendix C Revisions:** Jim Williams (API) reported that some minor editorial changes had been made to the draft Appendix C based on the Lubricants Committee letter ballot. A copy of the latest version with editorial changes highlighted is included under Attachment 5. Mr. Williams also distributed ILSAC's Appeals Procedures referenced in Appendix C. Doug Morris (API Office of General

Counsel) explained that these procedures mirror those used by API to resolve issues related to standards.

**Action Item: Committee members will forward for ILSAC consideration comments on the Appeals Procedures.**

**Next API S Category:** Lubricants Committee members suggested that discussions on the next API S category be tabled until later in the GF-4 category development process.

## **EOLCS UPDATE**

**Licensing Activities, SL and SJ Licenses, AMAP Update:** Kevin Ferrick (API) delivered an update on EOLCS licensing activities, SL and SJ licenses, and the Aftermarket Audit Program (AMAP). His presentation is included under Attachment 6.

**ACTION ITEM: API staff will work with committee members and others to explore ways to use AMAP engine test results to confirm BOI/VGRA guidelines and ACC Code practices.**

**Motor Oil Guide:** Mr. Ferrick asked the Lubricants Committee whether API Publication 1551, *Motor Oil Guide*, should be revised immediately or updated after the adoption of GF-4. Committee members agreed that the document had value and should be revised with the following stipulations: it should be made less prone to obsolescence, offered as a downloadable file on the API website, and linked to the two-page and more easily updateable Motor Oil Guide shelf card.

**Action Item: Kevin Ferrick (API) will revise Publication 1551, *Motor Oil Guide*, as directed by the Lubricants Committee and circulate it for Committee review.**

## **HEAVY DUTY ENGINE OILS**

**DEOAP Report:** Lowell Norris (ExxonMobil) delivered the DEOAP Report on behalf of Steve Kennedy (ExxonMobil). A copy is included under Attachment 7. Committee members showed interest in a number of items:

- The Engine Manufacturers Association (EMA) members of the DEOAP have asked the panel to consider modifying some of the procedures set forth in Appendix D of API 1509. These modifications are intended to better define the conditions under which EMA can by-pass a New Category Development Team (NCDT) and the ASTM Heavy Duty Engine Oil Classification Panel (HDEOCP) and propose a category to the API Lubricants Committee. Any changes to the appendix would be brought forward to the Lubricants Committee for approval.
- The DEOAP is drafting a survey to determine which current C categories are being recommended by diesel engine manufacturers. Lubricants Committee members agreed that such a survey would be beneficial and probably should be extended to diesel engine oil marketers. The committee asked Lowell Norris to carry this message to the DEOAP.

**Action Item: Lowell Norris (ExxonMobil) will ask DEOAP Chairs Greg Shank (Mack) and Steve Kennedy at the next DEOAP meeting to conduct the survey and consider extending it to diesel engine oil marketers.**

**PC-10 NCET Status:** PC-10 New Category Evaluation Team (NCET) Chair Bill Runkle (Valvoline) reported that the PC-10 NCET is making steady progress toward building a case for PC-10. More specific milestones are described under Attachment 8.

**PC-10 Funding:** The PC-10 NCET is looking for API and EMA volunteers to serve on its Funding Group. Lew Williams from Lubrizol will represent ACC.

**Action Items: API and EMA representatives are needed for the PC-10 Funding Group. Nominees should be forwarded to API.**

## **BASE OIL INTERCHANGE/VISCOSITY-GRADE READ-ACROSS TASK FORCE REPORT**

**Single Technology Matrix Proposal:** Mayur Shah (Lubrizol) proposed to the Lubricants Committee the Single Technology Matrix (STM) process recently approved by the BOI/VGRA Task Force. His presentation and the appendix explaining STM are included under Attachment 9.

In his presentation, Dr. Shah asked the Lubricants Committee to consider two motions: 1) Approve the concept of the STM process for inclusion in the BOI and VGRA guidelines and 2) allow STM to be applied to the BOI and VGRA guidelines for the Sequence IIIF test.

Lowell Norris made a motion to letter ballot the concept of the STM process for inclusion in the BOI and VGRA guidelines. This ballot would approve the concept only. Separate ballots would be necessary to apply STM to a specific test and/or engine oil category. The motion carried [12-0-0].

Lowell Norris made a second motion to letter ballot the application of STM to BOI guidelines where the Sequence IIIF is required (currently GF-3, API SL and API CI-4). The motion carried [12-0-0].

**Action Item: API staff will issue letter ballots to the Lubricants Committee for its approval of the concept of the STM process for inclusion in the BOI and VGRA guidelines and the application of STM to BOI where the Sequence IIIF is required (currently GF-3, API SL and API CI-4).**

These revisions will become effective after successful ballot and subsequent notification of licensees.

Vice Chair Alexander congratulated Dr. Shah and the STM Task Group on their efforts. Mr. Alexander noted that Margaret Lemmon (Lubrizol) initiated this proposal more than three years ago.

**BOI/VGRA Items for LC Ballot:** BOI/VGRA Chair Cherrillo listed a number of items approved by the Task Force for Lubricants Committee ballot (see Attachment 10). Mr. Cherrillo made a motion to move these items to Lubricants Committee letter ballot. The motion carried [12-0-0].

**Action Item: API staff will letter ballot the items recently approved by the BOI/VGRA Task Force.**

## **LIAISON REPORTS**

ASTM liaison Ralph Cherrillo, Detroit Advisory Panel (DAP) liaison Steve Herzog (Degussa) and Two-Stroke Engines liaison Alan Weinberg (Weinberg Distributing) have provided written reports as attachments to these minutes (Attachments 11, 12 and 13 respectively). Note: API staff was asked to consider distributing OEM presentations at DAP meetings to all licensees when appropriate.

Charles Sherwood (Ford) has asked the Lubricants Committee if it would like to also receive a report from the SAE Fuels and Lubricants Committee. Lubricants Committee members agreed that a report would be useful.

## **NEW STANDARDS BUSINESS**

No one raised new standards business.

## **NEXT MEETINGS**

The Lubricants Committee agreed to discuss possible meeting dates at the November 12 Business Meeting.