



Designation: D2596 – 20

Standard Test Method for Measurement of Extreme-Pressure Properties of Lubricating Grease (Four-Ball Method)¹

This standard is issued under the fixed designation D2596; the number immediately following the designation indicates the year of original adoption or, in the case of revision, the year of last revision. A number in parentheses indicates the year of last reapproval. A superscript epsilon (ϵ) indicates an editorial change since the last revision or reapproval.

This standard has been approved for use by agencies of the U.S. Department of Defense.

1. Scope*

1.1 This test method covers the determination of the load-carrying properties of lubricating greases. Three determinations are made:

- 1.1.1 Load-Wear Index (formerly called Mean-Hertz Load),
- 1.1.2 Weld Point, by means of the Four-Ball Extreme-Pressure (EP) Tester, and
- 1.1.3 Last nonseizure load (LNSL).

1.2 The values stated in SI units are to be regarded as the standard. The values in parentheses are for information only.

1.3 *This standard does not purport to address all of the safety concerns, if any, associated with its use. It is the responsibility of the user of this standard to establish appropriate safety, health, and environmental practices and determine the applicability of regulatory limitations prior to use.*

1.4 *This international standard was developed in accordance with internationally recognized principles on standardization established in the Decision on Principles for the Development of International Standards, Guides and Recommendations issued by the World Trade Organization Technical Barriers to Trade (TBT) Committee.*

2. Referenced Documents

2.1 *ASTM Standards:*²

- D2509 Test Method for Measurement of Load-Carrying Capacity of Lubricating Grease (Timken Method)
- G40 Terminology Relating to Wear and Erosion

2.2 *American National Standard:*³

- B3.12 Metal Balls

¹ This test method is under the jurisdiction of ASTM Committee D02 on Petroleum Products, Liquid Fuels, and Lubricants and is the direct responsibility of Subcommittee D02.G0.04 on Functional Tests - Tribology.

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² For referenced ASTM standards, visit the ASTM website, www.astm.org, or contact ASTM Customer Service at service@astm.org. For *Annual Book of ASTM Standards* volume information, refer to the standard's Document Summary page on the ASTM website.

³ Available from American National Standards Institute (ANSI), 25 W. 43rd St., 4th Floor, New York, NY 10036, http://www.ansi.org.

3. Terminology

3.1 *Definitions:*

3.1.1 *compensation line, n*—a line of plot on log-log paper where the coordinates are scar diameter in millimetres and applied load in kilograms-force (or Newtons) obtained under dynamic conditions.

3.1.1.1 *Discussion*—Shown in Fig. 1 as line ABE.

3.1.2 *compensation scar diameter*—the average diameter, in millimetres, of the wear scar on the stationary balls caused by the rotating ball under an applied load in the presence of a lubricant, but without causing either seizure or welding.

3.1.3 *corrected load, n*—the load in kilograms-force (or Newtons) obtained by multiplying the applied load by the ratio of the Hertz scar diameter to the measured scar diameter at that load.

3.1.3.1 *Discussion*—In this test method, the corrected load is calculated for each run.

3.1.4 *extreme pressure (EP) additives*—tribologically reactive species that prevent mating metallic surfaces from adhering to each other under concentrated contact conditions with high PV values. **PV Product, G40**

3.1.4.1 *Discussion*—The PV value is the product of the contact pressure (MPa) and sliding velocity (m/s). **D2509**

3.1.5 *extreme pressure (EP) lubricants, n*—formulations whose effects may become observable at different operating conditions, preventing adhesive wear under mixed or boundary lubrication regimes and are characterized by an increased load carrying capacity, or increased tribofilm strength. **D2509**

3.1.6 *Hertz line, n*—a line of plot on log-log paper where the coordinates are scar diameter in millimetres and applied load in kilograms-force (or Newtons) obtained under static conditions.

3.1.6.1 *Discussion*—Shown in Fig. 1 as a Hertz line.

3.1.7 *Hertz scar diameter, n*—the average diameter, in millimetres, of an indentation caused by the deformation of the balls under static load (prior to test). It may be calculated from the equation:

$$D_h = 8.73 \times 10^{-2}(P)^{1/3} \quad (1)$$

where:

*A Summary of Changes section appears at the end of this standard

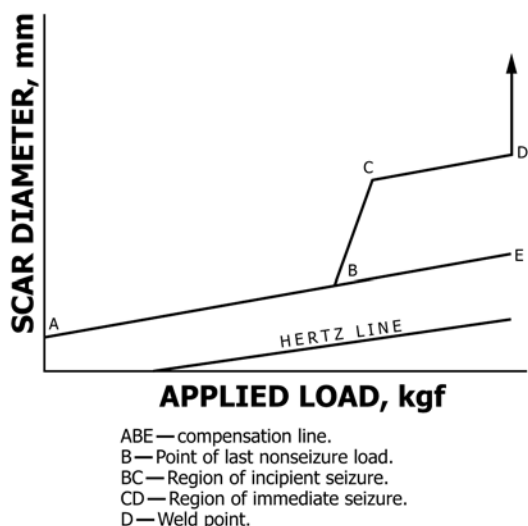


FIG. 1 Schematic Plot of Scar Diameter Versus Applied Load

D_h = Hertz diameter of the contact area in millimetres, and P = static applied load in kilograms-force.

3.1.8 *immediate seizure region, n*—that region of the scar-load curve characterized by seizure or welding at the startup or by large wear scars.

3.1.8.1 *Discussion*—Under conditions of this test method, the immediate seizure region is shown by line CD. Also, initial deflection of indicating pen on the optional friction-measuring device is larger than with nonseizure loads.

3.1.9 *incipient seizure or initial seizure region, n*—that region at which, with an applied load, there is a momentary breakdown of the lubricating film.

3.1.9.1 *Discussion*—This breakdown is noted by a sudden increase in the measured scar diameter, shown in Fig. 1 as line BC, and a momentary deflection of the indicating pen of the optional friction-measuring device.

3.1.10 *last nonseizure load, n*—the last load at which the measured scar diameter is not more than 5 % greater than the compensation value at that load.

3.1.10.1 *Discussion*—Shown in Fig. 1 as Point B.

3.1.11 *load carrying capacity, n—of a lubricant*, the maximum PV value [PV Limit, G40] that can be sustained by the lubricant at a reported temperature without failure of the sliding contact surfaces as evidenced by adhesive wear or localized welding.

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3.1.11.1 *Discussion*—The PV value is the product of the contact pressure (MPa) and sliding velocity (m/s).

3.1.12 *load-wear index (or the load-carrying property of a lubricant), n*—an index of the ability of a lubricant to minimize wear at applied loads.

3.1.12.1 *Discussion*—Under the conditions of this test, specific loadings in kilograms-force (or Newtons) having intervals of approximately 0.1 logarithmic units, are applied to the three stationary balls for ten runs prior to welding. The load-wear index is the average of the sum of the corrected loads determined for the ten applied loads immediately preceding the weld point.

3.1.13 *weld point, n*—the lowest applied load at which sliding surfaces seize and then weld.

3.1.13.1 *Discussion*—Under the conditions of this test, the lowest applied load in kilograms-force (or Newtons) at which the rotating ball seizes and then welds to the three stationary balls, indicating the extreme-pressure level of the lubricating grease has been exceeded. See Fig. 1, Point D.

3.1.13.2 *Discussion*—Some lubricating greases do not allow true welding, and extreme scoring of the three stationary balls results. In such cases, the applied load which produces a maximum scar diameter of 4 mm is reported as the weld point.

4. Summary of Test Method

4.1 The tester is operated with one steel ball under load rotating against three steel balls held stationary in the form of a cradle. The rotating speed is 1770 r/min ± 60 r/min. Lubricating greases are brought to 27 °C ± 8 °C (80 °F ± 15 °F) and then subjected to a series of tests of 10 s duration at increasing loads until welding occurs.

5. Significance and Use

5.1 This test method, used for specification purposes, differentiates between lubricating greases having low, medium, and high level of extreme-pressure properties. The results do not necessarily correlate with results from service.⁴

5.2 It is noted that lubricating greases that have as their fluid component a silicone, halogenated silicone, or a mixture comprising silicone fluid and petroleum oil, are not applicable to this method of test.

6. Apparatus

6.1 *Four-Ball Extreme-Pressure Lubricant Tester*,⁵ illustrated in Fig. 2.

NOTE 1—It is important to distinguish between the Four-Ball EP Tester and the Four-Ball Wear Tester. The Four-Ball Wear Tester can be used under a variety of test conditions at loads up to 490 N (50 kgf). The Four-Ball EP Tester is designed for testing under more severe conditions and lacks the sensitivity necessary for the Four-Ball Wear Test.

6.2 *Microscope*,⁵ equipped with calibrated measuring scale and readable to an accuracy of 0.01 mm.

6.3 *Timer*, graduated in tenths of a second.

NOTE 2—Optional equipment with Four-Ball apparatus consists of a friction-measuring device electrically driven and conveniently graduated in 10 s markings.

7. Materials

7.1 *Cleaning Fluids*—For preparing balls and apparatus for the test should be those capable of removing metal preservative coating from the balls, eliminating carryover effects from one

⁴ Further details on this test method may be found in: Sayles, F. S., et al, *National Lubricating Grease Institute Spokesman*, Vol 32, No. 5, August 1968, pp. 162–167.

⁵ The sole source of supply of the apparatus (microscopes 103.10 A and 103.10 B) known to the committee at this time is Falex Corporation, 1020 Airpark Dr., Sugar Grove, IL, 60554-9585. If you are aware of alternative suppliers, please provide this information to ASTM International Headquarters. Your comments will receive careful consideration at a meeting of the responsible technical committee,¹ which you may attend.

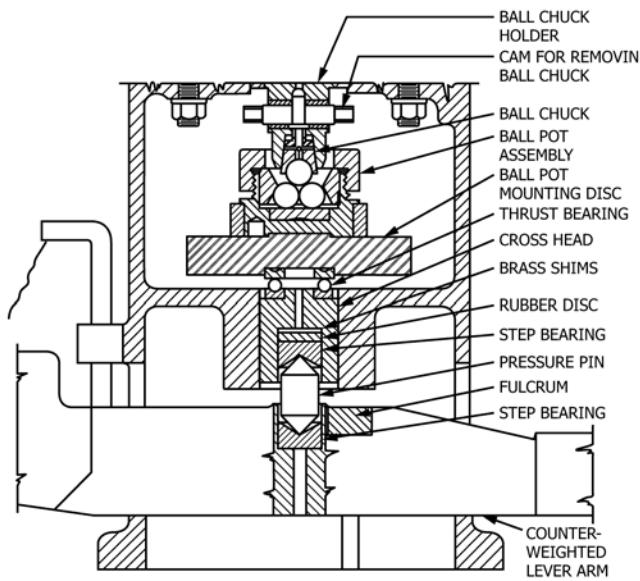


FIG. 2 Sectional View of Four-Ball EP Tester

test to the next. The cleaning fluid selected should be non-film-forming and not contribute to the wear or antiwear properties of the test lubricant (for example, chlorinated solvents should not be used).

NOTE 3—Previously, to remove the corrosion inhibitor coating on the test balls, first washing with Stoddard Solvent (Warning—See 7.1.1), followed by rinsing with n-heptane (Warning—See 7.1.2), and allowing to air dry has proven to satisfactorily remove the corrosion inhibitor coating. Depending on the lubricating grease chemistry, other solvents may be required to completely remove the residual lubricating grease from the test cup assembly parts. It is up to the user of this test method to determine the solvents required to thoroughly clean the ball cup assembly parts and other parts of the test machine that have come in contact with the lubricating grease being tested.

7.1.1 Stoddard Solvent or Mineral Spirits, Reagent Grade—(Warning—Combustible. Health hazard.)

7.1.2 ASTM n-heptane⁶—(Warning—Flammable. Health hazard.)

7.2 Test Balls⁷—Test balls shall be chrome alloy steel, made from AISI standard steel No. E-52100, with diameter of 12.7 mm (0.5 in.), Grade 25 EP (Extra Polish). Such balls are described in ANSI Specifications B3.12, for Metal Balls. The Extra-Polish finish is not described in that specification. The Rockwell C hardness shall be 64 to 66, a closer limit than is found in the ANSI requirement.

8. Preparation of Apparatus

8.1 Thoroughly clean four new test balls, ball pot, and chuck assemblies by first washing using the solvents selected in 7.1.

NOTE 4—Previously, users were directed to first wash the parts with Stoddard Solvent (Warning—See 7.1.1) to remove the corrosion inhibitor

⁶ Described in the 1998 Annual Book of ASTM Standards, Vol 05.04, Motor Fuels, Section I, Annex 2, Section A2.7, Reference Materials.

⁷ Steel balls meeting this description were used in developing the precision of the test. They are available from ball bearing or laboratory equipment manufacturers and distributors. All balls used in one test should be taken from one carton (of 500 balls) as received from the supplier.

coating, followed by a rinse with n-heptane (Warning—See 7.1.2), and allowing to air dry. These are listed as guidance, but are not mandatory.

NOTE 5—Do not use solvents such as carbon tetrachloride or other solvents that may inherently possess extreme pressure properties which may affect the results.

8.2 Lower the crosshead by raising the lever arm. Lock the lever arm in the raised position by means of a locking arrangement for that purpose.

9. Procedure

9.1 Bring lubricant to be tested to 27 °C ± 8 °C (80 °F ± 15 °F).

9.2 Completely fill the ball pot with the lubricating grease to be tested, avoiding the inclusion of air pockets. Imbed the three steel test balls in the grease. Place the lock ring carefully over the three balls and screw down the lock nut securely. Scrape off the excess grease pushed onto the lock nut.

NOTE 6—Subsequent independent investigations reported in 1971 by several laboratories indicate that optimum test repeatability is obtained when the force on the lock-down nut is maintained within the range 50 ft-lbf ± 5 ft-lbf (68 N·m ± 7 N·m), applied and measured by means of a torque wrench. Significantly lower weld points were obtained when the force applied was approximately 100 ft-lbf (136 N·m).

9.3 Press one ball into the ball chuck and mount the chuck into chuck-holder.

9.4 Examine the ball chuck carefully before each run. The chuck is continually subjected to wear and seizure and should be replaced when it will not fit into the ball chuck-holder tight enough to support its own weight, or if the ball seat shows signs of seizure.

9.5 Install the ball pot assembly on the test apparatus in contact with the fourth ball. Place the mounting disk between ball pot and thrust bearing.

9.6 Place the weight tray and weights on the horizontal arm in the correct notch for a base test load of 784 N (80 kgf). Release the lever arm and gently apply (Note 7) the test load to the balls, making certain the ball pot assembly and mounting disk are centered. If the optional friction-measuring device is used, connect the calibrated arm on the ball pot to the indicator spring by means of the clip and wire, placing clip and indicator support over the numbers which correspond to the applied load.

NOTE 7—Shock-loading should be avoided as it may deform the balls permanently.

9.7 Start the motor and run for 10 s ± 0.2 s. The time for the apparatus to “coast” to a stop is not considered.

9.8 Remove the load from the balls by raising the lever arm and locking it in raised position. If the friction-measuring device is used, remove clip and wire. Remove the ball pot assembly; remove the chuck and discard the ball.

9.9 Measure the scar diameter of test balls as follows:

9.9.1 Option A—Remove the lock nut and release the test balls. Clean the balls with the solvents selected in 7.1 and then n-heptane, and wipe dry with soft cloth. Place the individual balls on a suitable holder and by means of a microscope, measure to the nearest 0.01 mm the scar diameters both parallel

TABLE 1 Suggested Form for Recording Test Results

Column 1 Applied Load, kgf ^A (L)	Column 2 Scar Diameter Ball 1, mm	Column 3 Scar Diameter Ball 2, mm	Column 4 Scar Diameter Ball 3, mm	Column 5 Average Scar Diameter, mm (\bar{X})	Column 6 Compensation Scar Diameter, mm	Column 7 Compensation Scar Diameter, +5 % mm	Column 8 LD_n Factor	Column 9 Corrected Load, kgf LD_n/\bar{X}
6	0.95	...
8	1.40	...
10	1.88	...
13	0.21	0.22	2.67	...
16	0.23	0.24	3.52	...
20	0.25	0.26	4.74	...
24	0.26	0.27	6.05	...
32	0.29	0.30	8.87	...
40	0.31	0.33	11.96	...
50	0.34	0.36	16.10	...
63	0.37	0.39	21.86	...
80	0.40	0.42	30.08	...
100	0.44	0.46	40.5	...
126	0.47	0.49	55.2	...
160	0.52	0.55	75.8	...
200	0.58	0.61	102.2	...
250	137.5	...
315	187.1	...
400	258	...
500	347	...
620	462	...
800	649	...

^A To convert from kilograms-force to newtons, multiply by 9.806.

(horizontal) and normal (vertical) to the striations in the scar surface of one of the three test balls.

9.9.2 *Option B*—Retain the balls in the ball pot. Wipe excess grease from the balls and ball pot. Wash the ball surfaces with the solvents selected in 7.1 and then *n*-heptane. Using a microscope, measure to the nearest 0.01 mm the scar diameters both parallel (horizontal) and normal (vertical) to the striations in the scar surface of one of the three test balls. Measurement by microscope of the scar diameters on all three balls rather than one ball as outlined in Options A or B may be made if the operator so desires.

9.10 Record (Table 1, Column 5) for the 784 N (80 kgf) load the average scar diameter by any one of the two techniques described in 9.9. Compare this average scar diameter (Table 1, Column 5) to the compensation line average scar diameter (Table 1, Column 6). If the average scar diameter is not more than 5 % from the compensation scar diameter (Table 1, Column 7), repeat the test at the next higher load (Table 1, Column 1), and again compare scar diameters. Continue this procedure until the last nonseizure load is determined.

9.11 If the measured scar diameter for the 784 N (80 kgf) load is more than 5 % from the compensation scar diameter, the next run is made at the next lower load (Table 1, Column 1). Continue this procedure until the last nonseizure load is determined.

NOTE 8—When the optional friction-measuring device is used, the last nonseizure load is detected by a gradual transverse movement of the indicating pen.

9.12 Make additional runs at consecutively higher test loads (Table 1, Column 1), recording the measured scar diameter(s) and discarding test balls, until welding occurs. Make a check run at this point. If welding does not occur on the check run, then repeat the test at the next higher load until welding is verified.

9.13 Shut off the motor immediately to prevent damage to the tester. Excessive wear or seizure of the ball and ball chuck may result if caution is not observed. Welding may be detected by any or all of the following:

- (1) If friction-measuring device is used, a sharp transverse movement of the indicating pen.
- (2) Increased noise level of motor.
- (3) Smoking from the ball pot.
- (4) A sudden drop in the lever arm.

10. Calculations and Reports

10.1 *Corrected Load*—Calculate and record (Table 1, Column 9) for each applied load between the last nonseizure load and weld point using the equation:

$$\text{Corrected load, kgf} = LD_n/\bar{X} \quad (2)$$

where:

- L = applied load, kgf, that is, total weight applied (tray and weights) multiplied by lever arm ratio,
- D_h = Hertz scar diameter, mm, and
- X = average scar diameter, mm.

10.2 *Load-Wear Index* (see Note 9)—Calculate and report the Load-Wear Index (formerly Mean-Hertz Load) in kilograms-force using the equation:

$$\text{Load - Wear Index, kgf} = A/10 \quad (3)$$

where:

- A = sum of the corrected loads determined for the ten applied loads immediately preceding the weld point (Note 10).

NOTE 9—The method of calculation was amended in 1982. For a lubricant with a weld point of 400 kg or less the Load Wear Index is the same with the old and the present method of calculation.

NOTE 10—If tests applied to the lubricant indicate it follows the compensation line, then A may be defined as: