

# **APAC Fluids and Lubricants Market for Electric Vehicles - Regional Analysis: Focus on Application, Product, and Region - Analysis and Forecast, 2022-2031**

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## **Abstracts**

### **APAC Fluids and Lubricants Market for EVs: Industry Overview**

The APAC fluids and lubricants market for electric vehicles is projected to reach \$2,363.8 million by 2031 from \$182.8 million in 2022, growing at a CAGR of 32.89% during the forecast period 2022-2031. Lubricating an electric vehicle is very different from lubricating a conventional internal combustion (IC) engine vehicle. In IC engine vehicles, oils are used to decrease engine friction. These oils degrade gradually as they get contaminated with combustion gases and need regular replacement. The fluids required for electric vehicles would have exposure to high voltages and temperatures. The fluids' longevity is also essential for lowering maintenance costs and increasing the marketability of electric vehicles. As electric vehicles have various power electronics components, the fluids must ensure the safety of such circuits and flow easily through different parts with lower viscosity. Additionally, these fluids should have anti-corrosion properties. Surging growth in sales of electric-powered two-wheelers in India and Vietnam is expected to boost the market growth in upcoming years.

### **Market Lifecycle Stage**

Fluids and lubricants for electric vehicles are in high demand due to the increasing number of applications for new fluids in electric vehicles. Various electric vehicle fluid and lubricant manufacturers are collaborating with different electric vehicle powertrain and battery technology providers to study and commercialize cooling technologies for batteries. Additionally, government subsidies and infrastructure development aimed at

promoting electric vehicles to reduce carbon dioxide emissions propel the APAC fluids and lubricants market for EVs.

### Industrial Impact

With governments throughout the APAC region implementing plans to increase electric vehicle sales and phase out IC engine vehicles, the APAC fluids and lubricants market for EVs is bound to expand in the coming years.

For instance, in March 2021, Repsol launched a new range of lubricants exclusively for electric vehicles and motorbikes. In its commitment to electric mobility, Repsol launched a new range of 100% electric vehicles that complement the hybrid vehicles launched by the company in 2019.

### Impact of COVID-19

COVID-19 had an immediate and significant impact on the APAC Fluids and Lubricants Market for EVs because of country-wide shutdowns of manufacturing sites, labor shortages, and disruptions in supply and demand chains globally, which distorted the market. The lockdowns imposed by the governments significantly reduced raw material productivity due to a shortage of operations in many regions throughout the world. However, the market is anticipated to recover and is expected to rise substantially over the forecast period.

### Market Segmentation:

#### Segmentation 1: by Vehicle Type

##### Type A

Two-Wheelers

Three-Wheelers

##### Type B

Passenger Vehicles

## Light Commercial Vehicles

## Heavy Commercial Vehicles

Application for fluids and lubricants for electric vehicles is mainly categorized into five vehicle types of EVs, i.e., two-wheelers, three-wheelers, passenger vehicles, light commercial vehicles, and heavy commercial vehicles. Heavy commercial vehicles consist of heavy buses and heavy trucks. Production and sales of passenger vehicles are anticipated to be higher than that of commercial vehicles, as more users are rapidly adopting EVs and exchanging their IC engine vehicles for EVs due to their cost efficiency and various government subsidies, among others. The passenger vehicles segment is expected to lead the market in the forecast period in Type B vehicle type, as the sales of electric passenger vehicles are anticipated to increase in the APAC region. Three-wheelers are the prominent segment in the forecast period in Type A vehicle type, holding more than one-fifth of the total volume market share in Type A vehicle type. For year 2021, Passenger Vehicles segment dominated in the Vehicle Type B segment and Three-Wheelers segment dominated in the Vehicle Type A segment.

### Segmentation 2: by Propulsion Type

Battery Electric Vehicles (BEVs)

Hybrid Electric Vehicles (HEVs)

Plug-In Hybrid Electric Vehicles (PHEVs)

HEVs dominated the propulsion type segment in the APAC fluids and lubricants market for electric vehicles for year 2021. These vehicle types are two-wheelers, three-wheelers, passenger vehicles, light commercial vehicles, and heavy commercial vehicles. While HEV and PHEV models have been in the market for many years, the development of battery technology, along with government norms for increased vehicle efficiency, has led to an increase in the adoption of HEVs as they are powered solely by the battery systems in the vehicle. The rise in the sales of HEVs makes them more crucial for automotive OEMs to ensure that the fluids in the EVs can optimize the thermal management and driving system. HEVs segment is expected to dominate the APAC fluids and lubricants market for electric vehicles in the forecast period.

### Segmentation 3: by Product Type

Grease

Thermal Fluids

Drive System Fluids

Brake Fluids

The prominent fluids developed for application in electric vehicles are greases, thermal fluids, driver system fluids, and brake fluids. These fluids are applied in various components such as e-motors, battery systems, bearings, constant velocity joints, power electronics, gears, and the braking system of electric vehicles. Generally, various components of an electric vehicle generate a lot of heat during the operation of the vehicle, such as the battery system and the e-motors. These components have led to the need for better thermal management in these vehicles. The new EV fluids have added additives and dielectric properties, which makes them suitable for application in electric vehicle components. These specialized fluids are able to provide better thermal management properties than regular coolants to electric vehicle powertrain components. Drive system fluids are expected to be the largest segment since they are essential for electric vehicles to cool their electric powertrain components and increase their range. For year 2021, drive system fluids segment dominated the APAC fluids and lubricants market for EVs and also expected to be the predominant segment throughout the forecast period.

### Segmentation 4: by Distribution Channel

OEMs

Aftermarket

The APAC fluids and lubricants market for EVs encompasses two main types of distribution channels: OEMs and the aftermarket. The OEMs channel is anticipated to dominate the APAC fluids and lubricants market for EVs in the forecast period, as most fluids have a very low replacement rate and increased production of electric vehicles. As EV fluids technology evolves, the longevity and efficiency of these fluids in EVs also

increase. Only a few EV fluids which might need to be replaced or changed due to vehicle servicing would be procured through the aftermarket. For year 2021, OEMs segment dominated the APAC fluids and lubricants market for EVs.

#### Segmentation 5: by Region

Japan

South Korea

India

Australia

Thailand

Indonesia

Malaysia

Vietnam

The demand for electric vehicle fluids varies according to various regions. For year 2021, Japan was the largest region in the APAC fluids and lubricants market for EVs due to an increase in the sales of hybrid electric vehicles (HEVs) in this country for the year. However, the India fluids and lubricants market for electric vehicles is expected to grow at a high growth rate during the forecast period (2022-2031). As the sale of electric two-wheelers, three-wheelers, and passenger vehicles grow rapidly, the India fluids and lubricants market for electric vehicles is expected to grow at high rates. Japan is expected to dominate the APAC fluids and lubricants market for EVs in the forecast period.

#### Recent Developments in the APAC Fluids and Lubricants Market for EVs

In November 2021, The Lubrizol Corporation partnered with Intel to develop the industry's first hydrocarbon collaboration for immersion fluid technology. The company's new immersion fluid solutions will be warranted on Intel Xeon and Core microarchitectures.

In November 2021, Petroliam Nasional Berhad (PETRONAS) unveiled its next-generation range of electric vehicle fluid solutions at its Global Research & Technology Centre in Turin, Italy.

In July 2021, TotalEnergies SE launched a dedicated hybrid transmission fluid for Great Wall Motors. Great Wall Motors, China's leading car manufacturer, is a key player in the development of electric vehicles.

## Demand – Drivers and Limitations

Following are the drivers for the APAC fluids and lubricants market for EVs:

Need for Corrosion Resistant Solutions in the Electric Vehicle Batteries

Increasing Demand to Further Extend the Range of the Electric Vehicles

Rapid Adoption of Immersive Cooling for the Electric Vehicle Batteries

Improved Durability of Powertrain in Electric Vehicles

Increasing Demand for High-Performance Grease in HEVs

Growing Need for Enhanced Electrification Components

Rapid Increase in Electric Two-Wheelers and Three-Wheelers Fleet

Following are the challenges for the APAC fluids and lubricants market for EVs:

Higher Cost of EV Fluids

Energy Efficiency Challenges

Developing Environment-Friendly Electric Vehicle Fluids

Lack of Optimized EV/HEVs Performance for Improving Thermal Conductivity

## Inadequate EV Charging Infrastructure

How can this report add value to end users?

**Product/Innovation Strategy:** The product segment helps the readers understand the different fluids and lubricants. Also, the study provides the readers with a detailed understanding of the APAC fluids and lubricants market for EVs based on application and product.

**Growth/Marketing Strategy:** To improve the capabilities of their product offerings, players in the APAC fluids and lubricants market for EVs are developing unique products. The readers will be able to comprehend the revenue-generating tactics used by players in the APAC fluids and lubricants market for EVs by looking at the growth/marketing strategies. Other market participants' tactics, such as go-to-market plans, will also assist readers in making strategic judgments.

**Competitive Strategy:** Players in the APAC fluids and lubricants market for EVs analyzed and profiled in the study include vehicle manufacturers that capture the maximum share of the market. Moreover, a detailed competitive benchmarking of the players operating in the APAC fluids and lubricants market for EVs has been done to help the readers understand how players compete against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, collaborations, and mergers and acquisitions are expected to aid the readers in understanding the untapped revenue pockets in the market.

### Key Market Players and Competition Synopsis

Profiled companies have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

The APAC Fluids and Lubricants Market for EVs has been segmented into different product types, among which Grease captured around 11.4% of the market as of 2021. The Thermal Fluids/Coolants segment accounted for around 18.5%, Drive System Fluids/Transmission Fluids segment accounted for 56.7%, and brake fluids accounted for 13.4% of the total demand in 2021 in terms of value.

### Key Companies Profiled

## Type 1 Companies (by Product Offerings): Private Companies

SK Lubricants Co., Ltd. (SK Inc.)

GS Caltex Corporation

S-OIL CORPORATION

Kl?ber Lubrication

Panolin AG

## Type 2 Companies (by Product Offerings): Public Companies

Idemitsu Kosan Co., Ltd.

Exxon Mobil Corporation

Repsol SA

ENEOS Corporation (ENEOS Holdings, Inc.)

The Lubrizol Corporation

Petroliam Nasional Berhad (PETRONAS)

Shell plc

TotalEnergies SE

Valvoline Inc.

FUCHS



## Contents

### 1 MARKETS

#### 1.1 Industry Outlook

- 1.1.1 Trends: Current and Future
- 1.1.2 Supply Chain Network/MAP
- 1.1.3 Industry Attractiveness
  - 1.1.3.1 Threat of New Entrants (Low)
  - 1.1.3.2 Bargaining Power of Buyers (Low)
  - 1.1.3.3 Bargaining Power of Suppliers (High)
  - 1.1.3.4 Threat of Substitutes (Low)
  - 1.1.3.5 Intensity of Competitive Rivalry (High-Moderate)
- 1.1.4 Supply and Demand Analysis
- 1.1.5 Profit Margin Analysis
- 1.1.6 Additives for Fluids in Electric Vehicle Batteries
- 1.1.7 Ecosystem/Ongoing Programs
  - 1.1.7.1 Consortiums, Associations, and Regulatory Bodies
  - 1.1.7.2 Government Programs and Initiatives

#### 1.2 Business Dynamics

- 1.2.1 Business Drivers
  - 1.2.1.1 Need for Corrosion Resistant Solutions in the Electric Vehicle Batteries
  - 1.2.1.2 Increasing Demand to Further Extend the Range of the Electric Vehicles
  - 1.2.1.3 Rapid Adoption of Immersive Cooling for the Electric Vehicle Batteries
  - 1.2.1.4 Improved Durability of Powertrain in Electric Vehicles
  - 1.2.1.5 Increasing Demand for High-Performance Grease in HEVs
  - 1.2.1.6 Growing Need for Enhanced Electrification Components
  - 1.2.1.7 Rapid Increase in Electric Two-Wheelers and Three-Wheelers Fleet
- 1.2.2 Business Challenges
  - 1.2.2.1 Higher Cost of EV Fluids
  - 1.2.2.2 Energy Efficiency Challenges
  - 1.2.2.3 Developing Environment-Friendly Electric Vehicle Fluids
  - 1.2.2.4 Lack of Optimized EV/HEVs Performance for Improving Thermal Conductivity
  - 1.2.2.5 Inadequate EV Charging Infrastructure
- 1.2.3 Business Strategies
  - 1.2.3.1 Product Developments
  - 1.2.3.2 Market Developments
- 1.2.4 Corporate Strategies
  - 1.2.4.1 Mergers and Acquisitions

- 1.2.4.2 Partnerships, Collaborations, Joint Ventures, and Alliances
- 1.2.5 Business Opportunities
  - 1.2.5.1 Coolants for EV Electronics and Charging Port Cables
  - 1.2.5.2 Growing Trend for Development of Autonomous Vehicles
  - 1.2.5.3 Stringent Regulations by Government Bodies for Sustainable EV Environment

## **2 APPLICATION**

### 2.1 APAC Fluids and Lubricants Market for Electric Vehicles (by Application)

- 2.1.1 by Vehicle Type
  - 2.1.1.1 Type A
    - 2.1.1.1.1 Two-Wheelers
    - 2.1.1.1.2 Three-Wheelers
  - 2.1.1.2 Type B
    - 2.1.1.2.1 Passenger Vehicles
    - 2.1.1.2.2 Light Commercial Vehicles
    - 2.1.1.2.3 Heavy Commercial Vehicles
- 2.1.2 by Propulsion Type
  - 2.1.2.1 Battery Electric Vehicles (BEVs)
  - 2.1.2.2 Hybrid Electric Vehicles (HEVs)
  - 2.1.2.3 Plug-In Hybrid Electric Vehicles (PHEVs)

### 2.2 APAC Fluids and Lubricants Market for Electric Vehicles - Demand Analysis (by Application)

- 2.2.1 APAC Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data, 2021-2031
- 2.2.2 APAC Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data, 2021-2031

### 2.3 Comparative Analysis of Fluids and Lubricants Applications in Electric Vehicles

- 2.3.1 Applications for Fluids: IC Engine Vehicles vs. HEVs vs. PHEVs vs. BEVs
- 2.3.2 Emerging New Application Areas Owing to Electric Vehicle Adoption
- 2.3.3 Analyst View on Market Cannibalization

## **3 PRODUCT**

### 3.1 APAC Fluids and Lubricants Market for Electric Vehicles – Products and Specifications

- 3.1.1 by Product Type
  - 3.1.1.1 Grease
    - 3.1.1.1.1 by Application

- 3.1.1.1.1.1 e-Motors
- 3.1.1.1.1.2 Bearings
- 3.1.1.1.1.3 Constant Velocity Joints (CV Joints)
- 3.1.1.1.1.4 Others
- 3.1.1.2 Thermal Fluids
  - 3.1.1.2.1 Dielectric Fluids
  - 3.1.1.2.2 by Application
    - 3.1.1.2.2.1 Batteries
    - 3.1.1.2.2.2 By Technology
      - 3.1.1.2.2.2.1 Immersion Cooling
      - 3.1.1.2.2.2.2 Liquid Piped Cooling
    - 3.1.1.2.2.3 e-Motors
    - 3.1.1.2.2.4 Power Electronics
    - 3.1.1.2.2.5 Others
  - 3.1.1.2.3 e-Motors
  - 3.1.1.2.4 Power Electronics
  - 3.1.1.2.5 Others
- 3.1.1.3 Drive System Fluids
  - 3.1.1.3.1 by Application
    - 3.1.1.3.1.1 Gears
    - 3.1.1.3.1.2 e-Motors
    - 3.1.1.3.1.3 Others
  - 3.1.1.4 Brake Fluids
- 3.1.2 by Distribution Channel
  - 3.1.2.1 OEMs
  - 3.1.2.2 Aftermarket
- 3.2 APAC Fluids and Lubricants Market for Electric Vehicles - Demand Analysis (by Product)
  - 3.2.1 APAC Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data, 2021-2031
    - 3.2.1.1 Grease
    - 3.2.1.2 Thermal Fluids
    - 3.2.1.3 Drive System Fluids
    - 3.2.1.4 Brake Fluids
  - 3.2.2 APAC Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data, 2021-2031
- 3.3 Product Benchmarking: Growth Rate – Market Share Matrix
  - 3.3.1 Opportunity Matrix (by Region)
  - 3.3.2 Opportunity Matrix (by Product Type)
  - 3.3.3 Opportunity Matrix (by Distribution Channel)
- 3.4 Patent Analysis
- 3.5 APAC Pricing Analysis

### 3.6 Technology Roadmap

## 4 REGION

### 4.1 Japan

#### 4.1.1 Market

4.1.1.1 Buyer Attributes

4.1.1.2 Key Manufacturers in Japan

4.1.1.3 Competitive Benchmarking

4.1.1.4 Business Challenges

4.1.1.5 Business Drivers

#### 4.1.2 Application

4.1.2.1 Japan Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data

4.1.2.2 Japan Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data

#### 4.1.3 Product

4.1.3.1 Japan Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data

4.1.3.2 Japan Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data

4.1.3.3 Pricing Analysis

### 4.2 South Korea

#### 4.2.1 Market

4.2.1.1 Buyer Attributes

4.2.1.2 Key Manufacturers in South Korea

4.2.1.3 Competitive Benchmarking

4.2.1.4 Business Challenges

4.2.1.5 Business Drivers

#### 4.2.2 Application

4.2.2.1 South Korea Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data

4.2.2.2 South Korea Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data

#### 4.2.3 Product

4.2.3.1 South Korea Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data

4.2.3.2 South Korea Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data

#### 4.2.3.3 Pricing Analysis

### 4.3 India

#### 4.3.1 Market

##### 4.3.1.1 Buyer Attributes

##### 4.3.1.2 Key Manufacturers in India

##### 4.3.1.3 Competitive Benchmarking

##### 4.3.1.4 Business Challenges

##### 4.3.1.5 Business Drivers

#### 4.3.2 Application

4.3.2.1 India Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data

4.3.2.2 India Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data

#### 4.3.3 Product

4.3.3.1 India Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data

4.3.3.2 India Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel) Value and Volume Data

##### 4.3.3.3 Pricing Analysis

### 4.4 Australia

#### 4.4.1 Market

##### 4.4.1.1 Buyer Attributes

##### 4.4.1.2 Key Manufacturers in Australia

##### 4.4.1.3 Competitive Benchmarking

##### 4.4.1.4 Business Challenges

##### 4.4.1.5 Business Drivers

#### 4.4.2 Application

4.4.2.1 Australia Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data

4.4.2.2 Australia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data

#### 4.4.3 Product

4.4.3.1 Australia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data

4.4.3.2 Australia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data

##### 4.4.3.3 Pricing Analysis

### 4.5 Thailand

#### 4.5.1 Market

- 4.5.1.1 Buyer Attributes
- 4.5.1.2 Key Manufacturers in Thailand
- 4.5.1.3 Competitive Benchmarking
- 4.5.1.4 Business Challenges
- 4.5.1.5 Business Drivers
- 4.5.2 Application
  - 4.5.2.1 Thailand Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data
  - 4.5.2.2 Thailand Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data
- 4.5.3 Product
  - 4.5.3.1 Thailand Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data
  - 4.5.3.2 Thailand Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data
  - 4.5.3.3 Pricing Analysis
- 4.6 Indonesia
  - 4.6.1 Market
    - 4.6.1.1 Buyer Attributes
    - 4.6.1.2 Key Manufacturers in Indonesia
    - 4.6.1.3 Competitive Benchmarking
    - 4.6.1.4 Business Challenges
    - 4.6.1.5 Business Drivers
  - 4.6.2 Application
    - 4.6.2.1 Indonesia Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data
    - 4.6.2.2 Indonesia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data
  - 4.6.3 Product
    - 4.6.3.1 Indonesia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data
    - 4.6.3.2 Indonesia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data
    - 4.6.3.3 Pricing Analysis
- 4.7 Malaysia
  - 4.7.1 Market
    - 4.7.1.1 Buyer Attributes
    - 4.7.1.2 Key Manufacturers in Malaysia
    - 4.7.1.3 Competitive Benchmarking

4.7.1.4 Business Challenges

4.7.1.5 Business Drivers

4.7.2 Application

4.7.2.1 Malaysia Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data

4.7.2.2 Malaysia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data

4.7.3 Product

4.7.3.1 Malaysia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data

4.7.3.2 Malaysia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data

4.7.3.3 Pricing Analysis

4.8 Vietnam

4.8.1 Market

4.8.1.1 Buyer Attributes

4.8.1.2 Key Manufacturers in Vietnam

4.8.1.3 Competitive Benchmarking

4.8.1.4 Business Challenges

4.8.1.5 Business Drivers

4.8.2 Application

4.8.2.1 Vietnam Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Value and Volume Data

4.8.2.2 Vietnam Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Value and Volume Data

4.8.3 Product

4.8.3.1 Vietnam Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Value and Volume Data

4.8.3.2 Vietnam Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Value and Volume Data

4.8.3.3 Pricing Analysis

## **5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES**

5.1 Competitive Benchmarking

5.2 Product Matrix for EV Fluids and Lubricants

5.3 Company Profiles

5.3.1 Type 1 Companies (by Product Offerings): Private Companies

5.3.1.1 SK Lubricants Co., Ltd. (SK Inc.)

- 5.3.1.1.1 Company Overview
- 5.3.1.1.2 Role of SK Lubricants Co., Ltd. in the APAC Fluids and Lubricants Market for Electric Vehicles
  - 5.3.1.1.2.1 Product Portfolio
  - 5.3.1.1.2.2 Production Sites
- 5.3.1.1.3 Business Strategies
  - 5.3.1.1.3.1 Market Developments
- 5.3.1.1.4 Corporate Strategies
  - 5.3.1.1.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances
- 5.3.1.1.5 Analyst View for SK Lubricants Co., Ltd.
- 5.3.1.2 GS Caltex Corporation
  - 5.3.1.2.1 Company Overview
  - 5.3.1.2.2 Role of GS Caltex Corporation in the APAC Fluids and Lubricants Market for Electric Vehicles
    - 5.3.1.2.2.1 Product Portfolio
    - 5.3.1.2.2.2 Production Sites
  - 5.3.1.2.3 Business Strategies
    - 5.3.1.2.3.1 Product Developments
  - 5.3.1.2.4 Analyst View for GS Caltex Corporation
- 5.3.1.3 S-OIL CORPORATION
  - 5.3.1.3.1 Company Overview
  - 5.3.1.3.2 Role of S-OIL CORPORATION in the APAC Fluids and Lubricants Market for Electric Vehicles
    - 5.3.1.3.2.1 Product Portfolio
  - 5.3.1.3.3 Business Strategies
    - 5.3.1.3.3.1 Product Developments
  - 5.3.1.3.4 Analyst View for S-OIL CORPORATION
- 5.3.1.4 KI?ber Lubrication
  - 5.3.1.4.1 Company Overview
  - 5.3.1.4.2 Role of KI?ber Lubrication in the APAC Fluids and Lubricants Market for Electric Vehicles
    - 5.3.1.4.2.1 Product Portfolio
    - 5.3.1.4.2.2 Production Sites and R&D Analysis
  - 5.3.1.4.3 Business Strategies
    - 5.3.1.4.3.1 Product Developments
  - 5.3.1.4.4 Corporate Strategies
    - 5.3.1.4.4.1 Mergers and Acquisitions
  - 5.3.1.4.5 Analyst View for KI?ber Lubrication
- 5.3.1.5 Panolin AG



#### 5.3.1.5.1 Company Overview

#### 5.3.1.5.2 Role of Panolin AG in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.1.5.2.1 Product Portfolio

##### 5.3.1.5.2.2 Production Sites

#### 5.3.1.5.3 Corporate Strategies

##### 5.3.1.5.3.1 Partnerships, Joint Ventures, Collaborations, and Alliances

#### 5.3.1.5.4 Analyst View for Panolin AG

### 5.3.2 Type 2 Companies (by Product Offerings): Public Companies

#### 5.3.2.1 Idemitsu Kosan Co., Ltd.

##### 5.3.2.1.1 Company Overview

#### 5.3.2.1.2 Role of Idemitsu Kosan Co., Ltd. in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.1.2.1 Product Portfolio

##### 5.3.2.1.2.2 R&D Analysis

##### 5.3.2.1.2.3 Market Developments

#### 5.3.2.1.3 Corporate Strategies

##### 5.3.2.1.3.1 Partnerships, Joint Ventures, Collaborations, and Alliances

##### 5.3.2.1.3.2 Mergers and Acquisitions

#### 5.3.2.1.4 Analyst View for Idemitsu Kosan Co., Ltd.

#### 5.3.2.2 Exxon Mobil Corporation

##### 5.3.2.2.1 Company Overview

#### 5.3.2.2.2 Role of Exxon Mobil Corporation in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.2.2.1 Product Portfolio

##### 5.3.2.2.2.2 Production Sites and R&D Analysis

#### 5.3.2.2.3 Business Strategies

##### 5.3.2.2.3.1 Product Developments

##### 5.3.2.2.3.2 Market Developments

#### 5.3.2.2.4 Corporate Strategies

##### 5.3.2.2.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances

##### 5.3.2.2.4.2 Mergers and Acquisitions

#### 5.3.2.2.5 Analyst View for Exxon Mobil Corporation

#### 5.3.2.3 Repsol SA

##### 5.3.2.3.1 Company Overview

#### 5.3.2.3.2 Role of Repsol SA in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.3.2.1 Product Portfolio

##### 5.3.2.3.2.2 Production Sites and R&D Analysis

- 5.3.2.3.3 Business Strategies
  - 5.3.2.3.3.1 Product Developments
- 5.3.2.3.4 Corporate Strategies
  - 5.3.2.3.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances
  - 5.3.2.3.4.2 Mergers and Acquisitions
- 5.3.2.3.5 Analyst View for Repsol SA
- 5.3.2.4 ENEOS Corporation (ENEOS Holdings, Inc.)
  - 5.3.2.4.1 Company Overview
  - 5.3.2.4.2 Role of ENEOS Corporation in the APAC Fluids and Lubricants Market for Electric Vehicles
    - 5.3.2.4.2.1 Product Portfolio
    - 5.3.2.4.2.2 Production Sites and R&D Analysis
  - 5.3.2.4.3 Business Strategies
    - 5.3.2.4.3.1 Product Developments
  - 5.3.2.4.4 Corporate Strategies
    - 5.3.2.4.4.1 Mergers and Acquisitions
    - 5.3.2.4.4.2 Partnerships, Joint Ventures, Collaborations, and Alliances
  - 5.3.2.4.5 Analyst View for ENEOS Corporation
- 5.3.2.5 The Lubrizol Corporation
  - 5.3.2.5.1 Company Overview
  - 5.3.2.5.2 Role of The Lubrizol Corporation in the APAC Fluids and Lubricants Market for Electric Vehicles
    - 5.3.2.5.2.1 Product Portfolio
    - 5.3.2.5.2.2 Production Sites
  - 5.3.2.5.3 Corporate Strategies
    - 5.3.2.5.3.1 Partnerships, Joint Ventures, Collaborations, and Alliances
  - 5.3.2.5.4 Analyst View for The Lubrizol Corporation
- 5.3.2.6 Petroliam Nasional Berhad (PETRONAS)
  - 5.3.2.6.1 Company Overview
  - 5.3.2.6.2 Role of Petroliam Nasional Berhad (PETRONAS) in the APAC Fluids and Lubricants Market for Electric Vehicles
    - 5.3.2.6.2.1 Product Portfolio
    - 5.3.2.6.2.2 Production Sites and R&D Analysis
  - 5.3.2.6.3 Business Strategies
    - 5.3.2.6.3.1 Product Developments
    - 5.3.2.6.3.2 Market Developments
  - 5.3.2.6.4 Corporate Strategies
    - 5.3.2.6.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances
  - 5.3.2.6.5 Analyst View for Petroliam Nasional Berhad (PETRONAS)

### 5.3.2.7 Shell plc

#### 5.3.2.7.1 Company Overview

#### 5.3.2.7.2 Role of Shell plc in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.7.2.1 Product Portfolio

##### 5.3.2.7.2.2 Production Sites and R&D Analysis

#### 5.3.2.7.3 Business Strategies

##### 5.3.2.7.3.1 Product Developments

#### 5.3.2.7.4 Corporate Strategies

##### 5.3.2.7.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances

#### 5.3.2.7.5 Analyst View for Shell plc

### 5.3.2.8 TotalEnergies SE

#### 5.3.2.8.1 Company Overview

#### 5.3.2.8.2 Role of TotalEnergies SE in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.8.2.1 Product Portfolio

##### 5.3.2.8.2.2 Production Sites and R&D Analysis

#### 5.3.2.8.3 Business Strategies

##### 5.3.2.8.3.1 Product Developments

#### 5.3.2.8.4 Corporate Strategies

##### 5.3.2.8.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances

#### 5.3.2.8.5 Analyst View for TotalEnergies SE

### 5.3.2.9 Valvoline Inc.

#### 5.3.2.9.1 Company Overview

#### 5.3.2.9.2 Role of Valvoline Inc. in APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.9.2.1 Product Portfolio

##### 5.3.2.9.2.2 Production Sites and R&D Analysis

#### 5.3.2.9.3 Business Strategies

##### 5.3.2.9.3.1 Product Developments

#### 5.3.2.9.4 Corporate Strategies

##### 5.3.2.9.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances

#### 5.3.2.9.5 Analyst View for Valvoline

### 5.3.2.10 FUCHS

#### 5.3.2.10.1 Company Overview

#### 5.3.2.10.2 Role of FUCHS in the APAC Fluids and Lubricants Market for Electric Vehicles

##### 5.3.2.10.2.1 Product Portfolio

##### 5.3.2.10.2.2 Production Sites and R&D Analysis

#### 5.3.2.10.3 Business Strategies

##### 5.3.2.10.3.1 Product Developments

#### 5.3.2.10.4 Corporate Strategies

##### 5.3.2.10.4.1 Partnerships, Joint Ventures, Collaborations, and Alliances

#### 5.3.2.10.5 Analyst View for FUCHS

### 5.4 Other Key Companies

## 6 RESEARCH METHODOLOGY

### 6.1 Data Sources

#### 6.1.1 Primary Data Sources

#### 6.1.2 Secondary Data Sources

### 6.2 Data Triangulation

### 6.3 Market Estimation and Forecast

#### 6.3.1 Factors for Data Prediction and Modeling

## List Of Figures

### LIST OF FIGURES

- Figure 1: APAC Fluids and Lubricants Market for Electric Vehicles, \$Million, 2021-2031
- Figure 2: APAC Fluids and Lubricants Market for Electric Vehicles (by Product Type), Million Liter, 2022, 2026, and 2031
- Figure 3: APAC Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Thousand Liter, 2021-2031
- Figure 4: APAC Fluids and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Million Liter, 2021-2031
- Figure 5: APAC Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Million Liter, 2021-2031
- Figure 6: APAC Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Million Liter, 2021-2031
- Figure 7: APAC Fluids and Lubricants Market for Electric Vehicles (by Region), 2022
- Figure 8: APAC Fluids and Lubricants Market for Electric Vehicles: Coverage
- Figure 9: Industry Insights
- Figure 10: APAC Fluids and Lubricants Market for Electric Vehicles Supply Chain
- Figure 11: Stakeholders in APAC Fluids and Lubricants Market for Electric Vehicles
- Figure 12: Porter's Five Forces Analysis
- Figure 13: Supply and Demand Analysis, 2021-2031
- Figure 14: Consortiums, Associations, and Regulatory Bodies for Electric Vehicles
- Figure 15: Business Dynamics for the APAC Fluids and Lubricants Market for Electric Vehicles
- Figure 16: Driving Range of Various Electric Vehicles
- Figure 17: Components in Electric Vehicle Batteries
- Figure 18: Hybrid Electric Vehicle Fluids
- Figure 19: Key Business Strategies
- Figure 20: Product Developments (by Company), 2018-2021
- Figure 21: Market Developments (by Company), 2018-2021
- Figure 22: Key Corporate Strategies
- Figure 23: Partnerships, Collaborations, Joint Ventures, and Alliances (by Company), 2018-2021
- Figure 24: Coolants in EV Charging Cables
- Figure 25: Timeline
- Figure 26: APAC Fluids and Lubricants Market for Electric Vehicles (Two-Wheelers), \$Thousand and Thousand Liter, 2021-2031
- Figure 27: APAC Fluids and Lubricants Market for Electric Vehicles (Three-Wheelers),

\$Thousand and Thousand Liter, 2021-2031

Figure 28: APAC Fluids and Lubricants Market for Electric Vehicles (Passenger Vehicles), \$Million and Million Liter, 2021-2031

Figure 29: APAC Fluids and Lubricants Market for Electric Vehicles (Light Commercial Vehicles), \$Million and Million Liter, 2021-2031

Figure 30: APAC Fluids and Lubricants Market for Electric Vehicles (Heavy Commercial Vehicles), \$Million and Million Liter, 2021-2031

Figure 31: Component Structures for HEVs, PHEVs, and BEVs

Figure 32: APAC Fluids and Lubricants Market for Electric Vehicles (Battery Electric Vehicles), \$Million and Million Liter, 2021-2031

Figure 33: APAC Fluids and Lubricants Market for Electric Vehicles (Plug-In Hybrid Electric Vehicles), \$Million and Million Liter, 2021-2031

Figure 34: APAC Fluids and Lubricants Market for Electric Vehicles (Hybrid Electric Vehicles), \$Million and Million Liter, 2021-2031

Figure 35: Various Application Areas of Fluids and Lubricants in Electric Vehicles

Figure 36: APAC Fluids and Lubricants Market for Electric Vehicles (Grease), \$Million and Million Liter, 2021-2031

Figure 37: APAC Fluids and Lubricants Market for Electric Vehicles (Thermal Fluids), \$Million and Million Liter, 2021-2031

Figure 38: APAC Fluids and Lubricants Market for Electric Vehicles (Drive System Fluids), \$Million and Million Liter, 2021-2031

Figure 39: APAC Fluids and Lubricants Market for Electric Vehicles (Brake Fluids), \$Million and Million Liter, 2021-2031

Figure 40: APAC Fluids and Lubricants Market for Electric Vehicles (OEMs), \$Million and Million Liter, 2021-2031

Figure 41: APAC Fluids and Lubricants Market for Electric Vehicles (Aftermarket), \$Million and Million Liter, 2021-2031

Figure 42: APAC Fluids and Lubricants Market for Electric Vehicles Opportunity Matrix (by Region), \$Million

Figure 43: APAC Fluids and Lubricants Market for Electric Vehicles Opportunity Matrix (by Product Type), \$Million

Figure 44: APAC Fluids and Lubricants Market for Electric Vehicles Opportunity Matrix (by Distribution Channel), \$Million

Figure 45: Innovation Areas (by Patent Application) and Leading Patent Companies (by Fluid Type)

Figure 46: APAC Pricing Analysis (by Vehicle Type), Type A, USD/Liter

Figure 47: APAC Pricing Analysis (by Vehicle Type), Type B, USD/Liter

Figure 48: Technology Roadmap for Electric Vehicles

Figure 49: Competitive Benchmarking

Figure 50: Japan Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 51: Japan Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 52: Competitive Benchmarking  
Figure 53: South Korea Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 54: South Korea Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 55: Competitive Benchmarking  
Figure 56: India Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 57: India Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 58: Competitive Benchmarking  
Figure 59: Australia Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 60: Australia Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 61: Competitive Benchmarking  
Figure 62: Thailand Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 63: Thailand Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 64: Competitive Benchmarking  
Figure 65: Indonesia Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 66: Indonesia Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 67: Competitive Benchmarking  
Figure 68: Malaysia Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 69: Malaysia Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 70: Competitive Benchmarking  
Figure 71: Vietnam Pricing Analysis (by Vehicle Type), Type A, USD/Liter  
Figure 72: Vietnam Pricing Analysis (by Vehicle Type), Type B, USD/Liter  
Figure 73: Competitive Benchmarking  
Figure 74: Top-Down and Bottom-Up Approach  
Figure 75: Figure Assumptions and Limitations

## List Of Tables

### LIST OF TABLES

- Table 1: APAC Fluids and Lubricants Market for Electric Vehicles Overview
- Table 2: Key Factors Determining the Threat from New Entrants in the APAC Fluids and Lubricants Market for Electric Vehicles
- Table 3: Key Factors Determining the Bargaining Power of Buyers in the APAC Fluids and Lubricants Market for Electric Vehicles
- Table 4: Key Factors Determining the “Bargaining Power of Suppliers in the APAC Fluids and Lubricants Market for Electric Vehicles
- Table 5: Key Factors Determining the Intensity of Competitive Rivalry in the APAC Fluids and Lubricants Market for Electric Vehicles
- Table 6: Government Initiatives for Electric Vehicles
- Table 7: Impact of Business Drivers
- Table 8: Impact of Business Challenges
- Table 9: Impact of Business Opportunities
- Table 10: APAC Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Thousand Liter, 2021-2031
- Table 11: APAC Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Million Liter, 2021-2031
- Table 12: APAC Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$Thousand, 2021-2031
- Table 13: APAC Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Million, 2021-2031
- Table 14: APAC Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Million Liter, 2021-2031
- Table 15: APAC Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Million, 2021-2031
- Table 16: Grease Products for Electric Vehicles
- Table 17: APAC Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Million Liter, 2021-2031
- Table 18: APAC Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Million Liter, 2021-2031
- Table 19: APAC Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Million, 2021-2031
- Table 20: APAC Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Million, 2021-2031
- Table 21: APAC Fluids and Lubricants Market for Electric Vehicles (by Distribution



Channel), Million Liter, 2021-2031

Table 22: APAC Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Million, 2021-2031

Table 23: APAC Fluids and Lubricants Market for Electric Vehicles (by Region), Thousand Liter, 2021-2031

Table 24: APAC Fluids and Lubricants Market for Electric Vehicles (by Region), \$Million, 2021-2031

Table 25: Japan Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 26: Japan Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Million Liter, 2021-2031

Table 27: Japan Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$Thousand, 2021-2031

Table 28: Japan Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Million, 2021-2031

Table 29: Japan Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Million Liter, 2021-2031

Table 30: Japan Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Million, 2021-2031

Table 31: Japan Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Million Liter, 2021-2031

Table 32: Japan Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Million Liter, 2021-2031

Table 33: Japan Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Million, 2021-2031

Table 34: Japan Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Million, 2021-2031

Table 35: Japan Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Million Liter, 2021-2031

Table 36: Japan Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Million, 2021-2031

Table 37: South Korea Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 38: South Korea Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Million Liter, 2021-2031

Table 39: South Korea Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$Thousand, 2021-2031

Table 40: South Korea Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Million, 2021-2031

Table 41: South Korea Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Million Liter, 2021-2031

Table 42: South Korea Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Million, 2021-2031

Table 43: South Korea Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Million Liter, 2021-2031

Table 44: South Korea Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Million Liter, 2021-2031

Table 45: South Korea Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Million, 2021-2031

Table 46: South Korea Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Million, 2021-2031

Table 47: South Korea Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Million Liter, 2021-2031

Table 48: South Korea Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Million, 2021-2031

Table 49: India Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Thousand Liter, 2021-2031

Table 50: India Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Thousand Liter, 2021-2031

Table 51: India Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$Thousand, 2021-2031

Table 52: India Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Million, 2021-2031

Table 53: India Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Thousand Liter, 2021-2031

Table 54: India Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Thousand, 2021-2031

Table 55: India Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Thousand Liter, 2021-2031

Table 56: India Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Thousand Liter, 2021-2031

Table 57: India Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Million, 2021-2031

Table 58: India Fluids and Lubricants Market for Electric Vehicle Batteries (by Technology), \$Million, 2021-2031

Table 59: India Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Thousand Liter, 2021-2031

Table 60: India Fluids and Lubricants Market for Electric Vehicles (by Distribution

Channel), \$Million, 2021-2031

Table 61: Australia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 62: Australia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Million Liter, 2021-2031

Table 63: Australia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$USD, 2021-2031

Table 64: Australia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Million, 2021-2031

Table 65: Australia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Million Liter, 2021-2031

Table 66: Australia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Million, 2021-2031

Table 67: Australia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Million Liter, 2021-2031

Table 68: Australia Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Million Liter, 2021-2031

Table 69: Australia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Million, 2021-2031

Table 70: Australia Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Million, 2021-2031

Table 71: Australia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Million Liter, 2021-2031

Table 72: Australia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Million, 2021-2031

Table 73: Thailand Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 74: Thailand Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Thousand Liter, 2021-2031

Table 75: Thailand Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$USD, 2021-2031

Table 76: Thailand Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Million, 2021-2031

Table 77: Thailand Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Thousand Liter, 2021-2031

Table 78: Thailand Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Million, 2021-2031

Table 79: Thailand Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Thousand Liter, 2021-2031

Table 80: Thailand Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Thousand Liter, 2021-2031

Table 81: Thailand Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Million, 2021-2031

Table 82: Thailand Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Thousand, 2021-2031

Table 83: Thailand Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Thousand Liter, 2021-2031

Table 84: Thailand Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Million, 2021-2031

Table 85: Indonesia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 86: Indonesia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Thousand Liter, 2021-2031

Table 87: Indonesia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$Thousand, 2021-2031

Table 88: Indonesia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Thousand, 2021-2031

Table 89: Indonesia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Thousand Liter, 2021-2031

Table 90: Indonesia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Thousand, 2021-2031

Table 91: Indonesia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Thousand Liter, 2021-2031

Table 92: Indonesia Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Thousand Liter, 2021-2031

Table 93: Indonesia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Thousand, 2021-2031

Table 94: Indonesia Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Thousand, 2021-2031

Table 95: Indonesia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Thousand Liter, 2021-2031

Table 96: Indonesia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Thousand, 2021-2031

Table 97: Malaysia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 98: Malaysia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Thousand Liter, 2021-2031

Table 99: Malaysia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type),

Type A, \$USD, 2021-2031

Table 100: Malaysia Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Thousand, 2021-2031

Table 101: Malaysia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Thousand Liter, 2021-2031

Table 102: Malaysia Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Thousand, 2021-2031

Table 103: Malaysia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Thousand Liter, 2021-2031

Table 104: Malaysia Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Thousand Liter, 2021-2031

Table 105: Malaysia Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Thousand, 2021-2031

Table 106: Malaysia Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Thousand, 2021-2031

Table 107: Malaysia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Thousand Liter, 2021-2031

Table 108: Malaysia Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Thousand, 2021-2031

Table 109: Vietnam Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, Liter, 2021-2031

Table 110: Vietnam Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, Thousand Liter, 2021-2031

Table 111: Vietnam Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type A, \$Thousand, 2021-2031

Table 112: Vietnam Fluid and Lubricants Market for Electric Vehicles (by Vehicle Type), Type B, \$Thousand, 2021-2031

Table 113: Vietnam Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), Thousand Liter, 2021-2031

Table 114: Vietnam Fluids and Lubricants Market for Electric Vehicles (by Propulsion Type), \$Thousand, 2021-2031

Table 115: Vietnam Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), Thousand Liter, 2021-2031

Table 116: Vietnam Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), Thousand Liter, 2021-2031

Table 117: Vietnam Fluids and Lubricants Market for Electric Vehicles (by Product Type (by Application)), \$Thousand, 2021-2031

Table 118: Vietnam Fluids and Lubricants Market for Electric Vehicles (Batteries, by Technology), \$Thousand, 2021-2031

Table 119: Vietnam Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), Thousand Liter, 2021-2031

Table 120: Vietnam Fluids and Lubricants Market for Electric Vehicles (by Distribution Channel), \$Thousand, 2021-2031

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