

Global EV Electrified Transmission Fluids (ETF) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global EV Electrified Transmission Fluids (ETF) market size was valued at US\$ 844 million in 2025 and is forecast to a readjusted size of US\$ 2002 million by 2032 with a CAGR of 12.7% during review period.

EV Electrified Transmission Fluids are specialized transmission and driveline fluids used in battery electric vehicles, plug-in hybrid vehicles and selected hybrid e-drive systems, mainly covering e-axles, electric drive units, EV reduction gearboxes, e-transaxles and dedicated hybrid transmissions. Compared with conventional automatic transmission fluids or gear oils, these fluids are engineered not only for gear, bearing, differential and clutch lubrication, but also for low-viscosity efficiency, heat transfer, electrical insulation, copper compatibility, winding varnish compatibility, seal compatibility, anti-foaming performance and noise reduction. Major production and demand regions include China, Europe, the United States, Japan, South Korea and India, with demand mainly driven by OEM factory fill, e-drive system suppliers and a smaller service-fill aftermarket.

In 2025, global EV Electrified Transmission Fluids production reached approximately 88?98 million liters. The average FOB price was approximately USD 8.4?9.3 per liter, with higher pricing for direct motor contact fluids, wet e-motor fluids and OEM co-developed formulations.

EV Electrified Transmission Fluids are evolving from a niche replacement category within conventional lubricants into a critical functional material for e-drive efficiency, reliability and lifecycle management. The continued growth of global electric vehicle

sales, together with the rapid adoption of e-axes, integrated electric drive units and high-speed reduction gearboxes, is pushing these fluids beyond basic lubrication toward a combined role in lubrication, cooling, electrical insulation and material compatibility. In wet e-motor systems, 800 V platforms, high-speed motors and compact e-axle architectures, the fluid must operate under higher rotational speed, higher thermal stress and more complex contact with copper, aluminum, engineering plastics, winding varnishes and elastomers. This is accelerating co-development between OEMs, e-drive suppliers and lubricant companies. China, Europe, Japan and South Korea have built strong demand foundations through vehicle electrification, e-drive development and lubricant supply chains, while the United States and India are gradually adding incremental demand through localized EV production, commercial vehicle electrification and service network development.

The main challenges are long technical validation cycles, strict OEM approval requirements, relatively long replacement intervals and limited end-user awareness. Unlike engine oil, EV transmission fluids have a lower aftermarket replacement frequency, so near-term demand remains highly dependent on OEM factory fill and e-drive system supply. Market expansion is therefore closely linked to EV production, e-drive architecture upgrades and OEM platform renewal cycles. At the same time, product development requires difficult trade-offs between low-viscosity efficiency and gear wear protection, thermal conductivity and electrical insulation, as well as material compatibility and additive activity. Traditional ATF or gear oil formulation logic cannot be directly transferred to this market. Over the next few years, direct motor cooling fluids, low-conductivity wet e-drive fluids, low-viscosity e-axle fluids and dedicated hybrid e-transmission fluids will become the main growth areas, with leading suppliers competing around OEM approvals, regional supply capability and compatibility with high-voltage e-drive platforms.

This report is a detailed and comprehensive analysis for global EV Electrified Transmission Fluids (ETF) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global EV Electrified Transmission Fluids (ETF) market size and forecasts, in

Global EV Electrified Transmission Fluids (ETF) Market 2026 by Manufacturers, Regions, Type and Application, F...

consumption value (\$ Million), sales quantity (L), and average selling prices (US\$/L), 2021-2032

Global EV Electrified Transmission Fluids (ETF) market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (L), and average selling prices (US\$/L), 2021-2032

Global EV Electrified Transmission Fluids (ETF) market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (L), and average selling prices (US\$/L), 2021-2032

Global EV Electrified Transmission Fluids (ETF) market shares of main players, shipments in revenue (\$ Million), sales quantity (L), and ASP (US\$/L), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for EV Electrified Transmission Fluids (ETF)

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global EV Electrified Transmission Fluids (ETF) market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Shell plc, BP p.l.c., Exxon Mobil Corporation, Chevron Corporation, TotalEnergies SE, FUCHS SE, PETRONAS Lubricants International, Valvoline Global Operations, Repsol S.A., Motul S.A., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

EV Electrified Transmission Fluids (ETF) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and

forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

No Direct Motor Contact Fluids

Direct Motor Contact Fluids

Partial Contact Hybrid Transmission Fluids

Market segment by Drive Architecture

Integrated E-Axle Drive

Separate Motor and Reducer Drive

Electrified Multi-Speed Transmission

Others

Market segment by Base Oil Chemistry

Polyalphaolefin Synthetic Fluids

Group Three Hydrocracked Synthetic Fluids

Ester Synthetic Fluids

Others

Market segment by Viscosity Level

Low Viscosity Fluids

Ultra-Low Viscosity Fluids

Medium Viscosity Fluids

Market segment by Application

Reduction Gearbox Systems

E-Axle and Transaxle Systems

Hybrid Dedicated Transmission Systems

Others

Major players covered

Shell plc

BP p.l.c.

Exxon Mobil Corporation

Chevron Corporation

TotalEnergies SE

FUCHS SE

PETRONAS Lubricants International

Valvoline Global Operations

Repsol S.A.

Motul S.A.

Ravensberger Schmierstoffvertrieb GmbH

Wolf Oil Corporation NV

Kuwait Petroleum International Ltd

ENEOS Corporation

Idemitsu Kosan Co., Ltd.

SK Enmove Co., Ltd.

GS Caltex Corporation

Sinopec Lubricant Company

PetroChina Lubricant Company

Jiangsu Lopal Tech Co., Ltd.

Tongyi Petroleum Chemical Co., Ltd.

Hindustan Petroleum Corporation Limited

Gulf Oil Lubricants India Limited

North Sea Lubricants B.V.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of

Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe EV Electrified Transmission Fluids (ETF) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of EV Electrified Transmission Fluids (ETF), with price, sales quantity, revenue, and global market share of EV Electrified Transmission Fluids (ETF) from 2021 to 2026.

Chapter 3, the EV Electrified Transmission Fluids (ETF) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the EV Electrified Transmission Fluids (ETF) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and EV Electrified Transmission Fluids (ETF) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of EV Electrified Transmission Fluids (ETF).

Chapter 14 and 15, to describe EV Electrified Transmission Fluids (ETF) sales channel, distributors, customers, research findings and conclusion.

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