

Global EV Electrified Transmission Fluids (ETF) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global EV Electrified Transmission Fluids (ETF) market size is expected to reach \$ 2002 million by 2032, rising at a market growth of 12.7% CAGR during the forecast period (2026-2032).

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-axes, 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 studies the global EV Electrified Transmission Fluids (ETF) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for EV Electrified Transmission Fluids (ETF) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of EV Electrified Transmission Fluids (ETF) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global EV Electrified Transmission Fluids (ETF) total production and demand, 2021-2032, (L)

Global EV Electrified Transmission Fluids (ETF) total production value, 2021-2032, (USD Million)

Global EV Electrified Transmission Fluids (ETF) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (L), (based on production site)

Global EV Electrified Transmission Fluids (ETF) consumption by region & country, CAGR, 2021-2032 & (L)

U.S. VS China: EV Electrified Transmission Fluids (ETF) domestic production, consumption, key domestic manufacturers and share

Global EV Electrified Transmission Fluids (ETF) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (L)

Global EV Electrified Transmission Fluids (ETF) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (L)

Global EV Electrified Transmission Fluids (ETF) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (L)

This report profiles key players in the global EV Electrified Transmission Fluids (ETF) market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World EV Electrified Transmission Fluids (ETF) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (L) and average price (US\$/L) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global EV Electrified Transmission Fluids (ETF) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global EV Electrified Transmission Fluids (ETF) Market, Segmentation by Type:

No Direct Motor Contact Fluids

Direct Motor Contact Fluids

Partial Contact Hybrid Transmission Fluids

Global EV Electrified Transmission Fluids (ETF) Market, Segmentation by Drive Architecture:

Integrated E-Axle Drive

Separate Motor and Reducer Drive

Electrified Multi-Speed Transmission

Others

Global EV Electrified Transmission Fluids (ETF) Market, Segmentation by Base Oil Chemistry:

Polyalphaolefin Synthetic Fluids

Group Three Hydrocracked Synthetic Fluids

Ester Synthetic Fluids

Others

Global EV Electrified Transmission Fluids (ETF) Market, Segmentation by Viscosity Level:

Low Viscosity Fluids

Ultra-Low Viscosity Fluids

Medium Viscosity Fluids

Global EV Electrified Transmission Fluids (ETF) Market, Segmentation by Application:

Reduction Gearbox Systems

E-Axle and Transaxle Systems

Hybrid Dedicated Transmission Systems

Others

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global EV Electrified Transmission Fluids (ETF) market?
2. What is the demand of the global EV Electrified Transmission Fluids (ETF) market?
3. What is the year over year growth of the global EV Electrified Transmission Fluids (ETF) market?
4. What is the production and production value of the global EV Electrified Transmission Fluids (ETF) market?
5. Who are the key producers in the global EV Electrified Transmission Fluids (ETF) market?
6. What are the growth factors driving the market demand?

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