

# Global Lubricant Anti-wear Additive Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Lubricant Anti-wear Additive market size is expected to reach \$ 7795 million by 2032, rising at a market growth of 6.8% CAGR during the forecast period (2026-2032).

Lubricant anti-wear additives are functional chemical additives designed to reduce friction-induced wear, suppress metal-to-metal contact under boundary lubrication conditions, and improve the durability and operational reliability of mechanical systems. These additives are widely used in automotive engine oils, industrial hydraulic fluids, gear oils, metalworking fluids, compressor lubricants, greases, and specialty industrial lubrication systems. This research primarily focuses on dedicated anti-wear functional chemistries, including zinc dialkyldithiophosphate (ZDDP), ashless anti-wear additives, phosphorus-based and sulfur-based anti-wear chemistries, boron-containing friction modifiers, molybdenum-based anti-friction agents, and multifunctional boundary lubrication additives. Commercial products are typically supplied as oil-soluble liquids, additive concentrates, or functional intermediate packages blended into base oils during lubricant formulation. Core technologies involve organophosphorus and organosulfur synthesis, organometallic chemistry, tribofilm formation control, oxidation resistance optimization, and environmentally compliant low-SAPS formulation design. Key technical specifications commonly include phosphorus content, sulfur content, zinc concentration, four-ball wear scar diameter, weld load performance, copper corrosion resistance, thermal stability, volatility, and compatibility with API, ACEA, and ILSAC lubricant standards. Driven by tightening emission regulations, increasing electrification of industrial systems, and the demand for higher equipment durability, the industry is evolving toward low-ash, environmentally compliant, long-drain, thermally stable, and multifunctional anti-wear additive technologies. In 2025, the global average selling price of Lubricant Anti-Wear Additives is estimated at approximately USD 3,800–5,200 per

ton, while the industry average gross margin is estimated at around 22%–38%.

of electric drivetrains, wind power equipment, robotics, and advanced industrial systems are driving demand for low-corrosion, thermally stable, and environmentally compliant anti-wear chemistries. Ashless additives, boron-based friction modifiers, and molybdenum-based technologies are gradually becoming important growth areas in high-end lubricant applications.

Despite stable long-term demand, the industry remains highly concentrated and technology-intensive. High formulation barriers, strict OEM certification systems, and long customer validation cycles give leading multinational additive suppliers strong competitive advantages in high-end lubricant markets. Competition increasingly depends on formulation compatibility, oxidation stability, regulatory compliance, and technical service capabilities rather than pure price competition. Meanwhile, manufacturers in China, India, and Eastern Europe continue expanding in cost-sensitive industrial lubricant and hydraulic oil markets, gradually increasing participation in global supply chains.

Downstream demand is also gradually shifting from conventional passenger vehicle engine oils toward higher-value industrial and specialty lubrication applications. Although electric vehicle adoption may reduce long-term demand for traditional engine oil additives, industrial automation systems, mining equipment, wind turbine gearboxes, and advanced manufacturing machinery continue to support stable demand for anti-wear technologies. Increasing demand for longer oil drain intervals, lower maintenance costs, and higher equipment reliability is also accelerating adoption of multifunctional and long-life additive systems.

From a regional competition perspective, North America and Europe continue to dominate the high-end lubricant additive technology landscape due to strong R&D capabilities and long-established OEM relationships, while Japan maintains competitiveness in precision lubrication and specialty tribology applications. Meanwhile, China has rapidly emerged as a major manufacturing base for cost-competitive anti-wear additives and phosphorus-sulfur lubricant chemistries. Looking ahead, environmentally compliant, multifunctional, and long-life anti-wear additive systems are expected to become the industry's most important long-term development direction.

This report studies the global Lubricant Anti-wear Additive production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Lubricant Anti-wear Additive 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 Lubricant Anti-wear Additive that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Lubricant Anti-wear Additive total production and demand, 2021-2032, (Tons)

Global Lubricant Anti-wear Additive total production value, 2021-2032, (USD Million)

Global Lubricant Anti-wear Additive production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Lubricant Anti-wear Additive consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Lubricant Anti-wear Additive domestic production, consumption, key domestic manufacturers and share

Global Lubricant Anti-wear Additive production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Lubricant Anti-wear Additive production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Lubricant Anti-wear Additive production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Lubricant Anti-wear Additive 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 The Lubrizol Corporation, Infineum International Ltd., Afton Chemical Corporation, Chevron Oronite Company LLC, LANXESS AG, Italmatch Chemicals S.p.A., Dover Chemical Corporation, Dorf Ketal Chemicals I Pvt. Ltd., Prasol Chemicals Ltd., ADEKA Corporation, 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 Lubricant Anti-wear Additive market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) 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 Lubricant Anti-wear Additive Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Lubricant Anti-wear Additive Market, Segmentation by Type:

Primary Anti-Wear Additives

Friction Modifier & Anti-Wear Hybrid Additives

Extreme Pressure & Anti-Wear Hybrid Additives

Environment-friendly Low-SAPS Additives

High-temperature Stability Additives

Multifunctional Additive Packages

Others

## Global Lubricant Anti-wear Additive Market, Segmentation by Function:

ZDDP-based Anti-Wear Additives

Ashless Phosphorus-based Anti-Wear Additives

Sulfur-containing Anti-Wear Additives

Boron-based Anti-Wear Additives

Molybdenum-based Friction & Anti-Wear Additives

Others

## Global Lubricant Anti-wear Additive Market, Segmentation by Application:

Automotive

Industrial Manufacturing

Power Generation

Marine

Aerospace & Defense

Others

## Companies Profiled:

The Lubrizol Corporation

Infineum International Ltd.

Afton Chemical Corporation

Chevron Oronite Company LLC

LANXESS AG

Italmatch Chemicals S.p.A.

Dover Chemical Corporation

Dorf Ketal Chemicals I Pvt. Ltd.

Prasol Chemicals Ltd.

ADEKA Corporation

Sanyo Chemical Industries, Ltd.

Xinxiang Richful Lube Additive Co., Ltd.

Shanghai Hairun Additive Co., Ltd.

Tianhe Chemicals

HighLube (Liaoning Tianhe spin-off)

Wuxi South Petroleum Additive Co., Ltd.

Jinzhou Jinxing Petroleum Additive Co., Ltd.

Qingdao Tonghe Petroleum Additives Co., Ltd.

Dowpol Chemical International Corp.

Lanzhou Borun Petroleum Additive Co., Ltd.

Henan J&D Chemical Co., Ltd.

Beijing Yashicorun Petrochemical Co., Ltd.

R.T. Vanderbilt Holding Company, Inc.

King Industries, Inc.

Nippon Grease Co., Ltd.

Key Questions Answered:

1. How big is the global Lubricant Anti-wear Additive market?
2. What is the demand of the global Lubricant Anti-wear Additive market?
3. What is the year over year growth of the global Lubricant Anti-wear Additive market?
4. What is the production and production value of the global Lubricant Anti-wear Additive market?
5. Who are the key producers in the global Lubricant Anti-wear Additive market?
6. What are the growth factors driving the market demand?

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