

Global Lubricant Anti-wear Additive 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 Lubricant Anti-wear Additive market size was valued at US\$ 5001 million in 2025 and is forecast to a readjusted size of US\$ 7795 million by 2032 with a CAGR of 6.8% during review period.

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 is a detailed and comprehensive analysis for global Lubricant Anti-wear

Additive 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 Lubricant Anti-wear Additive market size and forecasts, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Lubricant Anti-wear Additive market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Lubricant Anti-wear Additive market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Tons), and average selling prices (US\$/Ton), 2021-2032

Global Lubricant Anti-wear Additive market shares of main players, shipments in revenue (\$ Million), sales quantity (Tons), and ASP (US\$/Ton), 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 Lubricant Anti-wear Additive

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 Lubricant Anti-wear Additive 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 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.

Market Segmentation

Lubricant Anti-wear Additive 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

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

Market segment 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

Market segment by Application

Automotive

Industrial Manufacturing

Power Generation

Marine

Aerospace & Defense

Others

Major players covered

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.

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 Lubricant Anti-wear Additive product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Lubricant Anti-wear Additive, with price, sales quantity, revenue, and global market share of Lubricant Anti-wear Additive from 2021 to 2026.

Chapter 3, the Lubricant Anti-wear Additive competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Lubricant Anti-wear Additive 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 Lubricant Anti-wear Additive 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 Lubricant

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Chapter 14 and 15, to describe Lubricant Anti-wear Additive sales channel, distributors, customers, research findings and conclusion.

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