

Global Lubricant Anti-wear Additive Market Growth 2026-2032

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Abstracts

The global Lubricant Anti-wear Additive market size is predicted to grow from US\$ 4754 million in 2025 to US\$ 7590 million in 2032; it is expected to grow at a CAGR of 7.3% from 2026 to 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.

LP Information, Inc. (LPI)'s newest research report, the "Lubricant Anti-wear Additive Industry Forecast" looks at past sales and reviews total world Lubricant Anti-wear Additive sales in 2025, providing a comprehensive analysis by region and market sector

of projected Lubricant Anti-wear Additive sales for 2026 through 2032. With Lubricant Anti-wear Additive sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Lubricant Anti-wear Additive industry.

This Insight Report provides a comprehensive analysis of the global Lubricant Anti-wear Additive landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Lubricant Anti-wear Additive portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Lubricant Anti-wear Additive market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Lubricant Anti-wear Additive and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Lubricant Anti-wear Additive.

This report presents a comprehensive overview, market shares, and growth opportunities of Lubricant Anti-wear Additive market by product type, application, key manufacturers and key regions and countries.

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

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

Segmentation by Application:

Automotive

Industrial Manufacturing

Power Generation

Marine

Aerospace & Defense

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Lubricant Anti-wear Additive market?

What factors are driving Lubricant Anti-wear Additive market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Lubricant Anti-wear Additive market opportunities vary by end market size?

How does Lubricant Anti-wear Additive break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Lubricant Anti-wear Additive Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Lubricant Anti-wear Additive by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Lubricant Anti-wear Additive by Country/Region, 2021, 2025 & 2032

2.2 Lubricant Anti-wear Additive Segment by Type

- 2.2.1 Primary Anti-Wear Additives
- 2.2.2 Friction Modifier & Anti-Wear Hybrid Additives
- 2.2.3 Extreme Pressure & Anti-Wear Hybrid Additives
- 2.2.4 Environment-friendly Low-SAPS Additives
- 2.2.5 High-temperature Stability Additives
- 2.2.6 Multifunctional Additive Packages
- 2.2.7 Others
- 2.2.8 Lubricant Anti-wear Additive Sales by Type
 - 2.2.8.1 Global Lubricant Anti-wear Additive Sales Market Share by Type (2021-2026)
 - 2.2.8.2 Global Lubricant Anti-wear Additive Revenue and Market Share by Type (2021-2026)
 - 2.2.8.3 Global Lubricant Anti-wear Additive Sale Price by Type (2021-2026)

2.3 Lubricant Anti-wear Additive Segment by Function

- 2.3.1 ZDDP-based Anti-Wear Additives
- 2.3.2 Ashless Phosphorus-based Anti-Wear Additives
- 2.3.3 Sulfur-containing Anti-Wear Additives
- 2.3.4 Boron-based Anti-Wear Additives

2.3.5 Molybdenum-based Friction & Anti-Wear Additives

2.3.6 Others

2.3.7 Lubricant Anti-wear Additive Sales by Function

2.3.7.1 Global Lubricant Anti-wear Additive Sales Market Share by Function
(2021-2026)

2.3.7.2 Global Lubricant Anti-wear Additive Revenue and Market Share by Function
(2021-2026)

2.3.7.3 Global Lubricant Anti-wear Additive Sale Price by Function (2021-2026)

2.4 Lubricant Anti-wear Additive Segment by Application

2.4.1 Automotive

2.4.2 Industrial Manufacturing

2.4.3 Power Generation

2.4.4 Marine

2.4.5 Aerospace & Defense

2.4.6 Others

2.4.7 Lubricant Anti-wear Additive Sales by Application

2.4.7.1 Global Lubricant Anti-wear Additive Sale Market Share by Application
(2021-2026)

2.4.7.2 Global Lubricant Anti-wear Additive Revenue and Market Share by
Application (2021-2026)

2.4.7.3 Global Lubricant Anti-wear Additive Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Lubricant Anti-wear Additive Breakdown Data by Company

3.1.1 Global Lubricant Anti-wear Additive Annual Sales by Company (2021-2026)

3.1.2 Global Lubricant Anti-wear Additive Sales Market Share by Company
(2021-2026)

3.2 Global Lubricant Anti-wear Additive Annual Revenue by Company (2021-2026)

3.2.1 Global Lubricant Anti-wear Additive Revenue by Company (2021-2026)

3.2.2 Global Lubricant Anti-wear Additive Revenue Market Share by Company
(2021-2026)

3.3 Global Lubricant Anti-wear Additive Sale Price by Company

3.4 Key Manufacturers Lubricant Anti-wear Additive Producing Area Distribution, Sales
Area, Product Type

3.4.1 Key Manufacturers Lubricant Anti-wear Additive Product Location Distribution

3.4.2 Players Lubricant Anti-wear Additive Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

- 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR LUBRICANT ANTI-WEAR ADDITIVE BY GEOGRAPHIC REGION

- 4.1 World Historic Lubricant Anti-wear Additive Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Lubricant Anti-wear Additive Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Lubricant Anti-wear Additive Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Lubricant Anti-wear Additive Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Lubricant Anti-wear Additive Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Lubricant Anti-wear Additive Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Lubricant Anti-wear Additive Sales Growth
- 4.4 APAC Lubricant Anti-wear Additive Sales Growth
- 4.5 Europe Lubricant Anti-wear Additive Sales Growth
- 4.6 Middle East & Africa Lubricant Anti-wear Additive Sales Growth

5 AMERICAS

- 5.1 Americas Lubricant Anti-wear Additive Sales by Country
 - 5.1.1 Americas Lubricant Anti-wear Additive Sales by Country (2021-2026)
 - 5.1.2 Americas Lubricant Anti-wear Additive Revenue by Country (2021-2026)
- 5.2 Americas Lubricant Anti-wear Additive Sales by Type (2021-2026)
- 5.3 Americas Lubricant Anti-wear Additive Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Lubricant Anti-wear Additive Sales by Region

- 6.1.1 APAC Lubricant Anti-wear Additive Sales by Region (2021-2026)
- 6.1.2 APAC Lubricant Anti-wear Additive Revenue by Region (2021-2026)
- 6.2 APAC Lubricant Anti-wear Additive Sales by Type (2021-2026)
- 6.3 APAC Lubricant Anti-wear Additive Sales by Application (2021-2026)
- 6.4 China
- 6.5 Japan
- 6.6 South Korea
- 6.7 Southeast Asia
- 6.8 India
- 6.9 Australia
- 6.10 China Taiwan

7 EUROPE

- 7.1 Europe Lubricant Anti-wear Additive by Country
 - 7.1.1 Europe Lubricant Anti-wear Additive Sales by Country (2021-2026)
 - 7.1.2 Europe Lubricant Anti-wear Additive Revenue by Country (2021-2026)
- 7.2 Europe Lubricant Anti-wear Additive Sales by Type (2021-2026)
- 7.3 Europe Lubricant Anti-wear Additive Sales by Application (2021-2026)
- 7.4 Germany
- 7.5 France
- 7.6 UK
- 7.7 Italy
- 7.8 Russia

8 MIDDLE EAST & AFRICA

- 8.1 Middle East & Africa Lubricant Anti-wear Additive by Country
 - 8.1.1 Middle East & Africa Lubricant Anti-wear Additive Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Lubricant Anti-wear Additive Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Lubricant Anti-wear Additive Sales by Type (2021-2026)
- 8.3 Middle East & Africa Lubricant Anti-wear Additive Sales by Application (2021-2026)
- 8.4 Egypt
- 8.5 South Africa
- 8.6 Israel
- 8.7 Turkey
- 8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

- 9.1 Market Drivers & Growth Opportunities
- 9.2 Market Challenges & Risks
- 9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

- 10.1 Raw Material and Suppliers
- 10.2 Manufacturing Cost Structure Analysis of Lubricant Anti-wear Additive
- 10.3 Manufacturing Process Analysis of Lubricant Anti-wear Additive
- 10.4 Industry Chain Structure of Lubricant Anti-wear Additive

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels
- 11.2 Lubricant Anti-wear Additive Distributors
- 11.3 Lubricant Anti-wear Additive Customer

12 WORLD FORECAST REVIEW FOR LUBRICANT ANTI-WEAR ADDITIVE BY GEOGRAPHIC REGION

- 12.1 Global Lubricant Anti-wear Additive Market Size Forecast by Region
 - 12.1.1 Global Lubricant Anti-wear Additive Forecast by Region (2027-2032)
 - 12.1.2 Global Lubricant Anti-wear Additive Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Lubricant Anti-wear Additive Forecast by Type (2027-2032)
- 12.7 Global Lubricant Anti-wear Additive Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 The Lubrizol Corporation
 - 13.1.1 The Lubrizol Corporation Company Information

13.1.2 The Lubrizol Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications

13.1.3 The Lubrizol Corporation Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 The Lubrizol Corporation Main Business Overview

13.1.5 The Lubrizol Corporation Latest Developments

13.2 Infineum International Ltd.

13.2.1 Infineum International Ltd. Company Information

13.2.2 Infineum International Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

13.2.3 Infineum International Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Infineum International Ltd. Main Business Overview

13.2.5 Infineum International Ltd. Latest Developments

13.3 Afton Chemical Corporation

13.3.1 Afton Chemical Corporation Company Information

13.3.2 Afton Chemical Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications

13.3.3 Afton Chemical Corporation Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Afton Chemical Corporation Main Business Overview

13.3.5 Afton Chemical Corporation Latest Developments

13.4 Chevron Oronite Company LLC

13.4.1 Chevron Oronite Company LLC Company Information

13.4.2 Chevron Oronite Company LLC Lubricant Anti-wear Additive Product Portfolios and Specifications

13.4.3 Chevron Oronite Company LLC Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Chevron Oronite Company LLC Main Business Overview

13.4.5 Chevron Oronite Company LLC Latest Developments

13.5 LANXESS AG

13.5.1 LANXESS AG Company Information

13.5.2 LANXESS AG Lubricant Anti-wear Additive Product Portfolios and Specifications

13.5.3 LANXESS AG Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 LANXESS AG Main Business Overview

13.5.5 LANXESS AG Latest Developments

13.6 Italmatch Chemicals S.p.A.

- 13.6.1 Italmatch Chemicals S.p.A. Company Information
- 13.6.2 Italmatch Chemicals S.p.A. Lubricant Anti-wear Additive Product Portfolios and Specifications
- 13.6.3 Italmatch Chemicals S.p.A. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.6.4 Italmatch Chemicals S.p.A. Main Business Overview
- 13.6.5 Italmatch Chemicals S.p.A. Latest Developments
- 13.7 Dover Chemical Corporation
 - 13.7.1 Dover Chemical Corporation Company Information
 - 13.7.2 Dover Chemical Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.7.3 Dover Chemical Corporation Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Dover Chemical Corporation Main Business Overview
 - 13.7.5 Dover Chemical Corporation Latest Developments
- 13.8 Dorf Ketal Chemicals I Pvt. Ltd.
 - 13.8.1 Dorf Ketal Chemicals I Pvt. Ltd. Company Information
 - 13.8.2 Dorf Ketal Chemicals I Pvt. Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.8.3 Dorf Ketal Chemicals I Pvt. Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Dorf Ketal Chemicals I Pvt. Ltd. Main Business Overview
 - 13.8.5 Dorf Ketal Chemicals I Pvt. Ltd. Latest Developments
- 13.9 Prasol Chemicals Ltd.
 - 13.9.1 Prasol Chemicals Ltd. Company Information
 - 13.9.2 Prasol Chemicals Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.9.3 Prasol Chemicals Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Prasol Chemicals Ltd. Main Business Overview
 - 13.9.5 Prasol Chemicals Ltd. Latest Developments
- 13.10 ADEKA Corporation
 - 13.10.1 ADEKA Corporation Company Information
 - 13.10.2 ADEKA Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.10.3 ADEKA Corporation Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 ADEKA Corporation Main Business Overview
 - 13.10.5 ADEKA Corporation Latest Developments

13.11 Sanyo Chemical Industries, Ltd.

13.11.1 Sanyo Chemical Industries, Ltd. Company Information

13.11.2 Sanyo Chemical Industries, Ltd. Lubricant Anti-wear Additive Product

Portfolios and Specifications

13.11.3 Sanyo Chemical Industries, Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Sanyo Chemical Industries, Ltd. Main Business Overview

13.11.5 Sanyo Chemical Industries, Ltd. Latest Developments

13.12 Xinxiang Richful Lube Additive Co., Ltd.

13.12.1 Xinxiang Richful Lube Additive Co., Ltd. Company Information

13.12.2 Xinxiang Richful Lube Additive Co., Ltd. Lubricant Anti-wear Additive Product

Portfolios and Specifications

13.12.3 Xinxiang Richful Lube Additive Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Xinxiang Richful Lube Additive Co., Ltd. Main Business Overview

13.12.5 Xinxiang Richful Lube Additive Co., Ltd. Latest Developments

13.13 Shanghai Hairun Additive Co., Ltd.

13.13.1 Shanghai Hairun Additive Co., Ltd. Company Information

13.13.2 Shanghai Hairun Additive Co., Ltd. Lubricant Anti-wear Additive Product

Portfolios and Specifications

13.13.3 Shanghai Hairun Additive Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Shanghai Hairun Additive Co., Ltd. Main Business Overview

13.13.5 Shanghai Hairun Additive Co., Ltd. Latest Developments

13.14 Tianhe Chemicals

13.14.1 Tianhe Chemicals Company Information

13.14.2 Tianhe Chemicals Lubricant Anti-wear Additive Product Portfolios and Specifications

13.14.3 Tianhe Chemicals Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Tianhe Chemicals Main Business Overview

13.14.5 Tianhe Chemicals Latest Developments

13.15 HighLube (Liaoning Tianhe spin-off)

13.15.1 HighLube (Liaoning Tianhe spin-off) Company Information

13.15.2 HighLube (Liaoning Tianhe spin-off) Lubricant Anti-wear Additive Product Portfolios and Specifications

13.15.3 HighLube (Liaoning Tianhe spin-off) Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 HighLube (Liaoning Tianhe spin-off) Main Business Overview

- 13.15.5 HighLube (Liaoning Tianhe spin-off) Latest Developments
- 13.16 Wuxi South Petroleum Additive Co., Ltd.
 - 13.16.1 Wuxi South Petroleum Additive Co., Ltd. Company Information
 - 13.16.2 Wuxi South Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.16.3 Wuxi South Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Wuxi South Petroleum Additive Co., Ltd. Main Business Overview
 - 13.16.5 Wuxi South Petroleum Additive Co., Ltd. Latest Developments
- 13.17 Jinzhou Jinxing Petroleum Additive Co., Ltd.
 - 13.17.1 Jinzhou Jinxing Petroleum Additive Co., Ltd. Company Information
 - 13.17.2 Jinzhou Jinxing Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.17.3 Jinzhou Jinxing Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Jinzhou Jinxing Petroleum Additive Co., Ltd. Main Business Overview
 - 13.17.5 Jinzhou Jinxing Petroleum Additive Co., Ltd. Latest Developments
- 13.18 Qingdao Tonghe Petroleum Additives Co., Ltd.
 - 13.18.1 Qingdao Tonghe Petroleum Additives Co., Ltd. Company Information
 - 13.18.2 Qingdao Tonghe Petroleum Additives Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.18.3 Qingdao Tonghe Petroleum Additives Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Qingdao Tonghe Petroleum Additives Co., Ltd. Main Business Overview
 - 13.18.5 Qingdao Tonghe Petroleum Additives Co., Ltd. Latest Developments
- 13.19 Dowpol Chemical International Corp.
 - 13.19.1 Dowpol Chemical International Corp. Company Information
 - 13.19.2 Dowpol Chemical International Corp. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.19.3 Dowpol Chemical International Corp. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Dowpol Chemical International Corp. Main Business Overview
 - 13.19.5 Dowpol Chemical International Corp. Latest Developments
- 13.20 Lanzhou Borun Petroleum Additive Co., Ltd.
 - 13.20.1 Lanzhou Borun Petroleum Additive Co., Ltd. Company Information
 - 13.20.2 Lanzhou Borun Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.20.3 Lanzhou Borun Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.20.4 Lanzhou Borun Petroleum Additive Co., Ltd. Main Business Overview
- 13.20.5 Lanzhou Borun Petroleum Additive Co., Ltd. Latest Developments
- 13.21 Henan J&D Chemical Co., Ltd.
 - 13.21.1 Henan J&D Chemical Co., Ltd. Company Information
 - 13.21.2 Henan J&D Chemical Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.21.3 Henan J&D Chemical Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 Henan J&D Chemical Co., Ltd. Main Business Overview
 - 13.21.5 Henan J&D Chemical Co., Ltd. Latest Developments
- 13.22 Beijing Yashicorun Petrochemical Co., Ltd.
 - 13.22.1 Beijing Yashicorun Petrochemical Co., Ltd. Company Information
 - 13.22.2 Beijing Yashicorun Petrochemical Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.22.3 Beijing Yashicorun Petrochemical Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.22.4 Beijing Yashicorun Petrochemical Co., Ltd. Main Business Overview
 - 13.22.5 Beijing Yashicorun Petrochemical Co., Ltd. Latest Developments
- 13.23 R.T. Vanderbilt Holding Company, Inc.
 - 13.23.1 R.T. Vanderbilt Holding Company, Inc. Company Information
 - 13.23.2 R.T. Vanderbilt Holding Company, Inc. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.23.3 R.T. Vanderbilt Holding Company, Inc. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.23.4 R.T. Vanderbilt Holding Company, Inc. Main Business Overview
 - 13.23.5 R.T. Vanderbilt Holding Company, Inc. Latest Developments
- 13.24 King Industries, Inc.
 - 13.24.1 King Industries, Inc. Company Information
 - 13.24.2 King Industries, Inc. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.24.3 King Industries, Inc. Lubricant Anti-wear Additive Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.24.4 King Industries, Inc. Main Business Overview
 - 13.24.5 King Industries, Inc. Latest Developments
- 13.25 Nippon Grease Co., Ltd.
 - 13.25.1 Nippon Grease Co., Ltd. Company Information
 - 13.25.2 Nippon Grease Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
 - 13.25.3 Nippon Grease Co., Ltd. Lubricant Anti-wear Additive Sales, Revenue, Price

and Gross Margin (2021-2026)

13.25.4 Nippon Grease Co., Ltd. Main Business Overview

13.25.5 Nippon Grease Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Lubricant Anti-wear Additive Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Lubricant Anti-wear Additive Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Primary Anti-Wear Additives

Table 4. Major Players of Friction Modifier & Anti-Wear Hybrid Additives

Table 5. Major Players of Extreme Pressure & Anti-Wear Hybrid Additives

Table 6. Major Players of Environment-friendly Low-SAPS Additives

Table 7. Major Players of High-temperature Stability Additives

Table 8. Major Players of Multifunctional Additive Packages

Table 9. Major Players of Others

Table 10. Global Lubricant Anti-wear Additive Sales by Type (2021-2026) & (Tons)

Table 11. Global Lubricant Anti-wear Additive Sales Market Share by Type (2021-2026)

Table 12. Global Lubricant Anti-wear Additive Revenue by Type (2021-2026) & (\$ million)

Table 13. Global Lubricant Anti-wear Additive Revenue Market Share by Type (2021-2026)

Table 14. Global Lubricant Anti-wear Additive Sale Price by Type (2021-2026) & (US\$/Ton)

Table 15. Major Players of ZDDP-based Anti-Wear Additives

Table 16. Major Players of Ashless Phosphorus-based Anti-Wear Additives

Table 17. Major Players of Sulfur-containing Anti-Wear Additives

Table 18. Major Players of Boron-based Anti-Wear Additives

Table 19. Major Players of Molybdenum-based Friction & Anti-Wear Additives

Table 20. Major Players of Others

Table 21. Global Lubricant Anti-wear Additive Sales by Function (2021-2026) & (Tons)

Table 22. Global Lubricant Anti-wear Additive Sales Market Share by Function (2021-2026)

Table 23. Global Lubricant Anti-wear Additive Revenue by Function (2021-2026) & (\$ million)

Table 24. Global Lubricant Anti-wear Additive Revenue Market Share by Function (2021-2026)

Table 25. Global Lubricant Anti-wear Additive Sale Price by Function (2021-2026) & (US\$/Ton)

Table 26. Global Lubricant Anti-wear Additive Sale by Application (2021-2026) & (Tons)

Table 27. Global Lubricant Anti-wear Additive Sale Market Share by Application (2021-2026)

Table 28. Global Lubricant Anti-wear Additive Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Lubricant Anti-wear Additive Revenue Market Share by Application (2021-2026)

Table 30. Global Lubricant Anti-wear Additive Sale Price by Application (2021-2026) & (US\$/Ton)

Table 31. Global Lubricant Anti-wear Additive Sales by Company (2021-2026) & (Tons)

Table 32. Global Lubricant Anti-wear Additive Sales Market Share by Company (2021-2026)

Table 33. Global Lubricant Anti-wear Additive Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Lubricant Anti-wear Additive Revenue Market Share by Company (2021-2026)

Table 35. Global Lubricant Anti-wear Additive Sale Price by Company (2021-2026) & (US\$/Ton)

Table 36. Key Manufacturers Lubricant Anti-wear Additive Producing Area Distribution and Sales Area

Table 37. Players Lubricant Anti-wear Additive Products Offered

Table 38. Lubricant Anti-wear Additive Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Lubricant Anti-wear Additive Sales by Geographic Region (2021-2026) & (Tons)

Table 42. Global Lubricant Anti-wear Additive Sales Market Share Geographic Region (2021-2026)

Table 43. Global Lubricant Anti-wear Additive Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 44. Global Lubricant Anti-wear Additive Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Lubricant Anti-wear Additive Sales by Country/Region (2021-2026) & (Tons)

Table 46. Global Lubricant Anti-wear Additive Sales Market Share by Country/Region (2021-2026)

Table 47. Global Lubricant Anti-wear Additive Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Lubricant Anti-wear Additive Revenue Market Share by

Country/Region (2021-2026)

Table 49. Americas Lubricant Anti-wear Additive Sales by Country (2021-2026) & (Tons)

Table 50. Americas Lubricant Anti-wear Additive Sales Market Share by Country (2021-2026)

Table 51. Americas Lubricant Anti-wear Additive Revenue by Country (2021-2026) & (\$ millions)

Table 52. Americas Lubricant Anti-wear Additive Sales by Type (2021-2026) & (Tons)

Table 53. Americas Lubricant Anti-wear Additive Sales by Application (2021-2026) & (Tons)

Table 54. APAC Lubricant Anti-wear Additive Sales by Region (2021-2026) & (Tons)

Table 55. APAC Lubricant Anti-wear Additive Sales Market Share by Region (2021-2026)

Table 56. APAC Lubricant Anti-wear Additive Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC Lubricant Anti-wear Additive Sales by Type (2021-2026) & (Tons)

Table 58. APAC Lubricant Anti-wear Additive Sales by Application (2021-2026) & (Tons)

Table 59. Europe Lubricant Anti-wear Additive Sales by Country (2021-2026) & (Tons)

Table 60. Europe Lubricant Anti-wear Additive Revenue by Country (2021-2026) & (\$ millions)

Table 61. Europe Lubricant Anti-wear Additive Sales by Type (2021-2026) & (Tons)

Table 62. Europe Lubricant Anti-wear Additive Sales by Application (2021-2026) & (Tons)

Table 63. Middle East & Africa Lubricant Anti-wear Additive Sales by Country (2021-2026) & (Tons)

Table 64. Middle East & Africa Lubricant Anti-wear Additive Revenue Market Share by Country (2021-2026)

Table 65. Middle East & Africa Lubricant Anti-wear Additive Sales by Type (2021-2026) & (Tons)

Table 66. Middle East & Africa Lubricant Anti-wear Additive Sales by Application (2021-2026) & (Tons)

Table 67. Key Market Drivers & Growth Opportunities of Lubricant Anti-wear Additive

Table 68. Key Market Challenges & Risks of Lubricant Anti-wear Additive

Table 69. Key Industry Trends of Lubricant Anti-wear Additive

Table 70. Lubricant Anti-wear Additive Raw Material

Table 71. Key Suppliers of Raw Materials

Table 72. Lubricant Anti-wear Additive Distributors List

Table 73. Lubricant Anti-wear Additive Customer List

Table 74. Global Lubricant Anti-wear Additive Sales Forecast by Region (2027-2032) & (Tons)

Table 75. Global Lubricant Anti-wear Additive Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 76. Americas Lubricant Anti-wear Additive Sales Forecast by Country (2027-2032) & (Tons)

Table 77. Americas Lubricant Anti-wear Additive Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 78. APAC Lubricant Anti-wear Additive Sales Forecast by Region (2027-2032) & (Tons)

Table 79. APAC Lubricant Anti-wear Additive Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Europe Lubricant Anti-wear Additive Sales Forecast by Country (2027-2032) & (Tons)

Table 81. Europe Lubricant Anti-wear Additive Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Middle East & Africa Lubricant Anti-wear Additive Sales Forecast by Country (2027-2032) & (Tons)

Table 83. Middle East & Africa Lubricant Anti-wear Additive Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Global Lubricant Anti-wear Additive Sales Forecast by Type (2027-2032) & (Tons)

Table 85. Global Lubricant Anti-wear Additive Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 86. Global Lubricant Anti-wear Additive Sales Forecast by Application (2027-2032) & (Tons)

Table 87. Global Lubricant Anti-wear Additive Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. The Lubrizol Corporation Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 89. The Lubrizol Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 90. The Lubrizol Corporation Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 91. The Lubrizol Corporation Main Business

Table 92. The Lubrizol Corporation Latest Developments

Table 93. Infineum International Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 94. Infineum International Ltd. Lubricant Anti-wear Additive Product Portfolios and

Specifications

Table 95. Infineum International Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 96. Infineum International Ltd. Main Business

Table 97. Infineum International Ltd. Latest Developments

Table 98. Afton Chemical Corporation Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 99. Afton Chemical Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 100. Afton Chemical Corporation Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 101. Afton Chemical Corporation Main Business

Table 102. Afton Chemical Corporation Latest Developments

Table 103. Chevron Oronite Company LLC Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 104. Chevron Oronite Company LLC Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 105. Chevron Oronite Company LLC Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 106. Chevron Oronite Company LLC Main Business

Table 107. Chevron Oronite Company LLC Latest Developments

Table 108. LANXESS AG Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 109. LANXESS AG Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 110. LANXESS AG Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 111. LANXESS AG Main Business

Table 112. LANXESS AG Latest Developments

Table 113. Italmatch Chemicals S.p.A. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 114. Italmatch Chemicals S.p.A. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 115. Italmatch Chemicals S.p.A. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 116. Italmatch Chemicals S.p.A. Main Business

Table 117. Italmatch Chemicals S.p.A. Latest Developments

Table 118. Dover Chemical Corporation Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 119. Dover Chemical Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 120. Dover Chemical Corporation Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 121. Dover Chemical Corporation Main Business

Table 122. Dover Chemical Corporation Latest Developments

Table 123. Dorf Ketal Chemicals I Pvt. Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 124. Dorf Ketal Chemicals I Pvt. Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 125. Dorf Ketal Chemicals I Pvt. Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 126. Dorf Ketal Chemicals I Pvt. Ltd. Main Business

Table 127. Dorf Ketal Chemicals I Pvt. Ltd. Latest Developments

Table 128. Prasol Chemicals Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 129. Prasol Chemicals Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 130. Prasol Chemicals Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 131. Prasol Chemicals Ltd. Main Business

Table 132. Prasol Chemicals Ltd. Latest Developments

Table 133. ADEKA Corporation Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 134. ADEKA Corporation Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 135. ADEKA Corporation Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 136. ADEKA Corporation Main Business

Table 137. ADEKA Corporation Latest Developments

Table 138. Sanyo Chemical Industries, Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 139. Sanyo Chemical Industries, Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 140. Sanyo Chemical Industries, Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 141. Sanyo Chemical Industries, Ltd. Main Business

Table 142. Sanyo Chemical Industries, Ltd. Latest Developments

Table 143. Xinxiang Richful Lube Additive Co., Ltd. Basic Information, Lubricant Anti-

wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 144. Xinxiang Richful Lube Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 145. Xinxiang Richful Lube Additive Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 146. Xinxiang Richful Lube Additive Co., Ltd. Main Business

Table 147. Xinxiang Richful Lube Additive Co., Ltd. Latest Developments

Table 148. Shanghai Hairun Additive Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 149. Shanghai Hairun Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 150. Shanghai Hairun Additive Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 151. Shanghai Hairun Additive Co., Ltd. Main Business

Table 152. Shanghai Hairun Additive Co., Ltd. Latest Developments

Table 153. Tianhe Chemicals Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 154. Tianhe Chemicals Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 155. Tianhe Chemicals Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 156. Tianhe Chemicals Main Business

Table 157. Tianhe Chemicals Latest Developments

Table 158. HighLube (Liaoning Tianhe spin-off) Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 159. HighLube (Liaoning Tianhe spin-off) Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 160. HighLube (Liaoning Tianhe spin-off) Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 161. HighLube (Liaoning Tianhe spin-off) Main Business

Table 162. HighLube (Liaoning Tianhe spin-off) Latest Developments

Table 163. Wuxi South Petroleum Additive Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 164. Wuxi South Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 165. Wuxi South Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 166. Wuxi South Petroleum Additive Co., Ltd. Main Business

Table 167. Wuxi South Petroleum Additive Co., Ltd. Latest Developments

Table 168. Jinzhou Jinxing Petroleum Additive Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 169. Jinzhou Jinxing Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 170. Jinzhou Jinxing Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 171. Jinzhou Jinxing Petroleum Additive Co., Ltd. Main Business

Table 172. Jinzhou Jinxing Petroleum Additive Co., Ltd. Latest Developments

Table 173. Qingdao Tonghe Petroleum Additives Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 174. Qingdao Tonghe Petroleum Additives Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 175. Qingdao Tonghe Petroleum Additives Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 176. Qingdao Tonghe Petroleum Additives Co., Ltd. Main Business

Table 177. Qingdao Tonghe Petroleum Additives Co., Ltd. Latest Developments

Table 178. Dowpol Chemical International Corp. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 179. Dowpol Chemical International Corp. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 180. Dowpol Chemical International Corp. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 181. Dowpol Chemical International Corp. Main Business

Table 182. Dowpol Chemical International Corp. Latest Developments

Table 183. Lanzhou Borun Petroleum Additive Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 184. Lanzhou Borun Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 185. Lanzhou Borun Petroleum Additive Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 186. Lanzhou Borun Petroleum Additive Co., Ltd. Main Business

Table 187. Lanzhou Borun Petroleum Additive Co., Ltd. Latest Developments

Table 188. Henan J&D Chemical Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors

Table 189. Henan J&D Chemical Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications

Table 190. Henan J&D Chemical Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 191. Henan J&D Chemical Co., Ltd. Main Business

Table 192. Henan J&D Chemical Co., Ltd. Latest Developments
Table 193. Beijing Yashicorun Petrochemical Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors
Table 194. Beijing Yashicorun Petrochemical Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
Table 195. Beijing Yashicorun Petrochemical Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 196. Beijing Yashicorun Petrochemical Co., Ltd. Main Business
Table 197. Beijing Yashicorun Petrochemical Co., Ltd. Latest Developments
Table 198. R.T. Vanderbilt Holding Company, Inc. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors
Table 199. R.T. Vanderbilt Holding Company, Inc. Lubricant Anti-wear Additive Product Portfolios and Specifications
Table 200. R.T. Vanderbilt Holding Company, Inc. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 201. R.T. Vanderbilt Holding Company, Inc. Main Business
Table 202. R.T. Vanderbilt Holding Company, Inc. Latest Developments
Table 203. King Industries, Inc. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors
Table 204. King Industries, Inc. Lubricant Anti-wear Additive Product Portfolios and Specifications
Table 205. King Industries, Inc. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 206. King Industries, Inc. Main Business
Table 207. King Industries, Inc. Latest Developments
Table 208. Nippon Grease Co., Ltd. Basic Information, Lubricant Anti-wear Additive Manufacturing Base, Sales Area and Its Competitors
Table 209. Nippon Grease Co., Ltd. Lubricant Anti-wear Additive Product Portfolios and Specifications
Table 210. Nippon Grease Co., Ltd. Lubricant Anti-wear Additive Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)
Table 211. Nippon Grease Co., Ltd. Main Business
Table 212. Nippon Grease Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Lubricant Anti-wear Additive
- Figure 2. Lubricant Anti-wear Additive Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Lubricant Anti-wear Additive Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Lubricant Anti-wear Additive Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Lubricant Anti-wear Additive Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Lubricant Anti-wear Additive Sales Market Share by Country/Region (2025)
- Figure 10. Lubricant Anti-wear Additive Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Primary Anti-Wear Additives
- Figure 12. Product Picture of Friction Modifier & Anti-Wear Hybrid Additives
- Figure 13. Product Picture of Extreme Pressure & Anti-Wear Hybrid Additives
- Figure 14. Product Picture of Environment-friendly Low-SAPS Additives
- Figure 15. Product Picture of High-temperature Stability Additives
- Figure 16. Product Picture of Multifunctional Additive Packages
- Figure 17. Product Picture of Others
- Figure 18. Global Lubricant Anti-wear Additive Sales Market Share by Type in 2026
- Figure 19. Global Lubricant Anti-wear Additive Revenue Market Share by Type (2021-2026)
- Figure 20. Product Picture of ZDDP-based Anti-Wear Additives
- Figure 21. Product Picture of Ashless Phosphorus-based Anti-Wear Additives
- Figure 22. Product Picture of Sulfur-containing Anti-Wear Additives
- Figure 23. Product Picture of Boron-based Anti-Wear Additives
- Figure 24. Product Picture of Molybdenum-based Friction & Anti-Wear Additives
- Figure 25. Product Picture of Others
- Figure 26. Global Lubricant Anti-wear Additive Sales Market Share by Function in 2026
- Figure 27. Global Lubricant Anti-wear Additive Revenue Market Share by Function (2021-2026)
- Figure 28. Lubricant Anti-wear Additive Consumed in Automotive
- Figure 29. Global Lubricant Anti-wear Additive Market: Automotive (2021-2026) & (Tons)

- Figure 30. Lubricant Anti-wear Additive Consumed in Industrial Manufacturing
- Figure 31. Global Lubricant Anti-wear Additive Market: Industrial Manufacturing (2021-2026) & (Tons)
- Figure 32. Lubricant Anti-wear Additive Consumed in Power Generation
- Figure 33. Global Lubricant Anti-wear Additive Market: Power Generation (2021-2026) & (Tons)
- Figure 34. Lubricant Anti-wear Additive Consumed in Marine
- Figure 35. Global Lubricant Anti-wear Additive Market: Marine (2021-2026) & (Tons)
- Figure 36. Lubricant Anti-wear Additive Consumed in Aerospace & Defense
- Figure 37. Global Lubricant Anti-wear Additive Market: Aerospace & Defense (2021-2026) & (Tons)
- Figure 38. Lubricant Anti-wear Additive Consumed in Others
- Figure 39. Global Lubricant Anti-wear Additive Market: Others (2021-2026) & (Tons)
- Figure 40. Global Lubricant Anti-wear Additive Sale Market Share by Application (2025)
- Figure 41. Global Lubricant Anti-wear Additive Revenue Market Share by Application in 2025
- Figure 42. Lubricant Anti-wear Additive Sales by Company in 2025 (Tons)
- Figure 43. Global Lubricant Anti-wear Additive Sales Market Share by Company in 2025
- Figure 44. Lubricant Anti-wear Additive Revenue by Company in 2025 (\$ millions)
- Figure 45. Global Lubricant Anti-wear Additive Revenue Market Share by Company in 2025
- Figure 46. Global Lubricant Anti-wear Additive Sales Market Share by Geographic Region (2021-2026)
- Figure 47. Global Lubricant Anti-wear Additive Revenue Market Share by Geographic Region in 2025
- Figure 48. Americas Lubricant Anti-wear Additive Sales 2021-2026 (Tons)
- Figure 49. Americas Lubricant Anti-wear Additive Revenue 2021-2026 (\$ millions)
- Figure 50. APAC Lubricant Anti-wear Additive Sales 2021-2026 (Tons)
- Figure 51. APAC Lubricant Anti-wear Additive Revenue 2021-2026 (\$ millions)
- Figure 52. Europe Lubricant Anti-wear Additive Sales 2021-2026 (Tons)
- Figure 53. Europe Lubricant Anti-wear Additive Revenue 2021-2026 (\$ millions)
- Figure 54. Middle East & Africa Lubricant Anti-wear Additive Sales 2021-2026 (Tons)
- Figure 55. Middle East & Africa Lubricant Anti-wear Additive Revenue 2021-2026 (\$ millions)
- Figure 56. Americas Lubricant Anti-wear Additive Sales Market Share by Country in 2025
- Figure 57. Americas Lubricant Anti-wear Additive Revenue Market Share by Country (2021-2026)
- Figure 58. Americas Lubricant Anti-wear Additive Sales Market Share by Type

(2021-2026)

Figure 59. Americas Lubricant Anti-wear Additive Sales Market Share by Application (2021-2026)

Figure 60. United States Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 61. Canada Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 62. Mexico Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 63. Brazil Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 64. APAC Lubricant Anti-wear Additive Sales Market Share by Region in 2025

Figure 65. APAC Lubricant Anti-wear Additive Revenue Market Share by Region (2021-2026)

Figure 66. APAC Lubricant Anti-wear Additive Sales Market Share by Type (2021-2026)

Figure 67. APAC Lubricant Anti-wear Additive Sales Market Share by Application (2021-2026)

Figure 68. China Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 69. Japan Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 70. South Korea Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 71. Southeast Asia Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 72. India Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 73. Australia Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 74. China Taiwan Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 75. Europe Lubricant Anti-wear Additive Sales Market Share by Country in 2025

Figure 76. Europe Lubricant Anti-wear Additive Revenue Market Share by Country (2021-2026)

Figure 77. Europe Lubricant Anti-wear Additive Sales Market Share by Type (2021-2026)

Figure 78. Europe Lubricant Anti-wear Additive Sales Market Share by Application (2021-2026)

Figure 79. Germany Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 80. France Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 81. UK Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 82. Italy Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 83. Russia Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 84. Middle East & Africa Lubricant Anti-wear Additive Sales Market Share by

Country (2021-2026)

Figure 85. Middle East & Africa Lubricant Anti-wear Additive Sales Market Share by Type (2021-2026)

Figure 86. Middle East & Africa Lubricant Anti-wear Additive Sales Market Share by Application (2021-2026)

Figure 87. Egypt Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 88. South Africa Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 89. Israel Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 90. Turkey Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 91. GCC Countries Lubricant Anti-wear Additive Revenue Growth 2021-2026 (\$ millions)

Figure 92. Manufacturing Cost Structure Analysis of Lubricant Anti-wear Additive in 2026

Figure 93. Manufacturing Process Analysis of Lubricant Anti-wear Additive

Figure 94. Industry Chain Structure of Lubricant Anti-wear Additive

Figure 95. Channels of Distribution

Figure 96. Global Lubricant Anti-wear Additive Sales Market Forecast by Region (2027-2032)

Figure 97. Global Lubricant Anti-wear Additive Revenue Market Share Forecast by Region (2027-2032)

Figure 98. Global Lubricant Anti-wear Additive Sales Market Share Forecast by Type (2027-2032)

Figure 99. Global Lubricant Anti-wear Additive Revenue Market Share Forecast by Type (2027-2032)

Figure 100. Global Lubricant Anti-wear Additive Sales Market Share Forecast by Application (2027-2032)

Figure 101. Global Lubricant Anti-wear Additive Revenue Market Share Forecast by Application (2027-2032)

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