

Metalworking Fluids Market by Type (Straight Oils, Soluble Oils, Semi-synthetic Fluids, Synthetic Fluids), Product Type (Removal Fluid, Protecting Fluids, Forming Fluids, Treating Fluids), End-use Industry - Global Forecast to 2029

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Abstracts

In terms of value, the metalworking fluids market is estimated to grow from USD 12.2 billion in 2024 to USD 14.7 billion by 2029, at a CAGR of 3.7%. The need for specialized metalworking fluids catered to the specific needs of the automotive industry is anticipated to endure, supporting the expansion and development of the metalworking fluids market, as long as automotive manufacturers keep innovating and investing in cutting-edge production technology.

“Soluble oils segment was the largest type of metalworking fluids market, in terms of value, in 2023.”

Soluble oils are the most used type in the metalworking fluids market, in terms of value, in 2023. Effective cooling and lubrication are provided by soluble oils during metalworking operations. By reducing the heat production and friction, they contribute to increased tool life and precision in machining. Soluble oils are frequently more affordable as compared to synthetic fluids or straight oils. These factors collectively contribute to soluble oils being the largest type of metalworking fluids market.

“Protecting fluids segment is projected to witness the highest CAGR in the metalworking fluids market, in terms of value, during the forecast period.”

The protecting fluids segment is projected to witness the highest CAGR in the metalworking fluids market, in terms of value, during the forecast period. The longevity

and maintenance of the machinery and equipment are becoming vital for manufacturers in order to ensure efficient operations and minimize downtime. Protective fluids, notably those made with eco-friendly materials and disposal techniques are becoming more popular since they meet regulatory requirements, driving the increasing demand for protecting fluids in the metalworking fluids market.

“Transport equipment manufacturing was the largest end-use industry of metalworking fluids market, in terms of value, in 2023.”

Transport equipment manufacturing stands as the largest end-user industry in the metalworking fluids market due to its extensive reliance on various metalworking fluids for smooth operation and maintenance of vehicles. From cars and trucks to airplanes and ships, transportation vehicles require metalworking fluids to reduce friction, prevent wear and tear, and ensure optimal performance. This demand is fueled by the continuous need for efficient and reliable transportation services across the globe, driving the growth of the metalworking fluids market in this sector. Also, the upcoming new technologies make the transport equipment manufacturing end-use industry a significant end-use in the market.

“North America is projected to be the second largest region, in terms of value, during the forecast period in the metalworking fluids market.”

The North America region is expected to see significant growth in the metalworking fluids market, owing to the presence of significant players such as Quaker Houghton, Exxon Mobil Corporation, Chevron Corporation, Chem Arrow Corporation, and Valvoline Inc., who have strengthened the region's standing in this industry. The increasing demand for high quality finished products with precise machining requirements are driving increased demand for metalworking fluids across various sectors. Overall, North America's innovation and environmental stewardship make it a promising market for metalworking fluids in supporting manufacturing operations.

By Company Type: Tier 1 - 69%, Tier 2 - 23%, and Tier 3 - 8%

By Designation: C-Level - 23%, Director Level - 37%, and Others - 40%

By Region: North America - 24%, Europe - 40%, Asia Pacific - 17%, South America – 7%, Middle East & Africa - 12%,

The key players profiled in the report include Quaker Houghton (US), Exxon Mobil Corporation (US), BP p.l.c. (UK), TotalEnergies SE (France), FUCHS (Germany), Idemitsu Kosan Co., Ltd. (Japan), Chevron Corporation (US), Chem Arrow Corporation (US), LUKOIL (Russia), China Petroleum & Chemical Corporation (SINOPEC) (China), and Valvoline Inc. (US).

Research Coverage

This report segments the market for metalworking fluids based on base oil type, product type, end-use industry, and region and provides estimations of volume (Kiloton) and value (USD Million) for the overall market size across various regions. A detailed analysis of key industry players has been conducted to provide insights into their business overviews, services, and key strategies, associated with the market for metalworking fluids.

Reasons to Buy this Report

This research report is focused on various levels of analysis — industry analysis (industry trends), market share analysis of top players, and company profiles, which together provide an overall view of the competitive landscape, emerging and high-growth segments of the metalworking fluids market; high-growth regions; and market drivers, restraints, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on metalworking fluids offered by top players in the global market

Analysis of key drives: (Increasing automotive production, technological advancements, and demand for high-performance machinery), restraints (Adoption of dry machining technologies, health and safety issues, and increasing EV production), opportunities (Product innovation and differentiation, and data-driven fluid management systems), and challenges (Fluctuating raw material prices, and stringent environmental regulations) influencing the growth of metalworking fluids market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the metalworking fluids market

Market Development: Comprehensive information about lucrative emerging markets — the report analyzes the markets for metalworking fluids across regions.

Market Diversification: Exhaustive information about new products, untapped regions, and recent developments in the global metalworking fluids market

Competitive Assessment: In-depth assessment of market shares, strategies, products, and manufacturing capabilities of leading players in the metalworking fluids market

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