

North America Automotive Synthetic Ester Lubricants Market Size and Forecast (2021 - 2031)

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Abstracts

The North America Automotive Synthetic Ester Lubricants Market is poised for significant growth, projected to reach approximately US\$ 544.0 million by 2031, up from US\$ 372.6 million in 2024. This growth trajectory indicates a compound annual growth rate (CAGR) of 5.7% from 2025 to 2031, reflecting the market's dynamic evolution in response to various factors.

Executive Summary and Market Analysis

The automotive synthetic ester lubricants market in North America is undergoing a notable transformation, primarily driven by stringent environmental regulations and advancements in vehicle technology. The U.S. Environmental Protection Agency (EPA) has implemented strict standards under the Vessel General Permit, mandating that Environmentally Acceptable Lubricants (EALs) must be at least 90% biodegradable by weight. Synthetic esters are well-positioned to meet these criteria due to their superior biodegradability and low toxicity to aquatic life.

According to the U.S. Department of Energy, the synthetic lubricants market, which includes esters, is expected to grow at a rate of approximately 4.5% through 2027. This growth is fueled by the increasing demand for advanced lubrication solutions across various automotive sectors. The Center for Automotive Research highlights that fuel economy standards have mandated passenger cars to achieve 36.5 miles per gallon (MPG) since 2015, with a target of 54.5 MPG by 2025. This push for improved fuel efficiency is driving the demand for high-performance synthetic lubricants that minimize friction and enhance overall efficiency.

The rise of electric vehicles (EVs) is also reshaping lubricant demand patterns. The

International Energy Agency projects that by 2030, the demand for light-vehicle lubricants in North America will begin to decline as EVs capture a larger market share. However, synthetic lubricants are expected to dominate the road transport sector, capturing 70% of the market by 2035, primarily due to their premium characteristics and higher profit margins. Additionally, the automotive aftermarket in North America is a significant driver of synthetic ester adoption, as fleet operators seek longer drain intervals and improved equipment protection under challenging operating conditions.

Strategic Insights

Market Segmentation Analysis

The North America Automotive Synthetic Ester Lubricants Market is segmented by product type and end use. By product type, the market includes Engine Oil, Motor Cycle Oil (MCO), Passenger Car Motor Oil (PCMO), Heavy Duty Engine Oil (HDEO), Hydraulic Oil, Gear Oil, Immersion Cooling Fluids, Refrigeration Oil, Grease, Metalworking Fluids, and others. The Engine Oil segment is expected to dominate the market in 2024.

In terms of end use, the market is divided into Conventional Vehicles and Electric Vehicles, with the Conventional Vehicles segment leading in 2024.

Market Outlook

Looking ahead, the integration of advanced nanotechnology is anticipated to be a transformative trend in the automotive synthetic ester lubricants market. Research indicates that incorporating nanoparticles into automotive lubricants can significantly reduce the coefficient of friction, thereby enhancing engine performance. These nanoparticles create an insulating layer around engine components, minimizing wear and extending engine life. Their ultra-small size and large surface area allow them to penetrate microscopic surface irregularities, forming protective tribofilms that enhance the lubricant's ability to withstand extreme temperatures and pressures.

Future trends in the market will likely include the continued development of nanotechnology for friction reduction, as well as other innovations that enhance lubricant performance. The top five innovations currently transforming the lubricants market include nanotechnology additives, which are crucial for performance vehicles that operate under harsh conditions. Synthetic ester lubricants already exhibit excellent friction-reducing properties, making them ideal candidates for nanoparticle

enhancement.

Country Insights

The North America Automotive Synthetic Ester Lubricants Market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The U.S. market benefits from a robust automotive manufacturing sector and a well-established aerospace industry, both of which require high-performance lubricants. Original equipment manufacturers are increasingly adopting synthetic ester lubricants due to their thermal stability, performance under extreme conditions, and environmentally friendly characteristics.

The growing demand for luxury vehicles, which often require advanced lubricants, along with the rapid expansion of the electric vehicle market, is further propelling market growth. Lubricant manufacturers are continuously innovating to develop ester formulations that are efficient and environmentally friendly, aligning with stringent emission regulations and sustainability goals.

Company Profiles

Key players in the North America Automotive Synthetic Ester Lubricants Market include Exxon Mobil Corp, TotalEnergies SE, Chevron Corp, BP Plc, China Petroleum & Chemical Corp (Sinopec), Fuchs SE, Valvoline Inc, Repsol SA, Phillips 66, and AMSOIL Inc. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:
- 3.3 Assumptions and Limitations

4. AUTOMOTIVE SYNTHETIC ESTER LUBRICANTS MARKET LANDSCAPE

- 4.1 Overview
- 4.2 Porter's Five Forces Analysis
 - 4.2.1 Bargaining Power of Suppliers
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Threat of Substitutes
 - 4.2.4 Threat of New Entrants
 - 4.2.5 Intensity of Competitive Rivalry
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors/Suppliers
 - 4.3.4 End Users
- 4.4 List of Vendors in the Value Chain

5. NORTH AMERICA AUTOMOTIVE SYNTHETIC ESTER LUBRICANTS MARKET – KEY MARKET DYNAMICS

5.1 North America Automotive Synthetic Ester Lubricants Market – Key Market Dynamics

5.2 Market Drivers

5.2.1 Surging Fuel Economy Standards and Emission Requirements Accelerating Technology

5.2.2 Electric Vehicle Market Expansion Creating Specialized Lubrication Demands

5.2.3 Growing Demand for Extended Drain Intervals Reducing Maintenance Costs

5.3 Market Restraints

5.3.1 High Production Costs and Raw Material Price Volatility

5.3.2 Competition from Alternative Lubricant Technologies

5.3.3 Regulatory Complexity and Certification Requirements

5.4 Market Opportunities

5.4.1 Circular Economy and Lubricant Recycling Technologies

5.4.2 Industry 4.0 and Smart Manufacturing Integration

5.4.3 Emerging Propulsion Technologies and Alternative Fuel Vehicles

5.5 Future Trends

5.5.1 Advanced Nanotechnology Integration for Enhanced Friction Reduction Performance

5.5.2 Multifunctional Lubricant Formulations Addressing Multiple Performance Requirements

5.5.3 Sustainable Manufacturing and Carbon Footprint Reduction Technologies

5.6 Impact of Drivers and Restraints:

6. AUTOMOTIVE SYNTHETIC ESTER LUBRICANTS MARKET – NORTH AMERICA ANALYSIS

6.1 North America Automotive Synthetic Ester Lubricants Market Volume (Tons), 2021–2031

6.2 North America Automotive Synthetic Ester Lubricants Market Volume Forecast Analysis

6.3 North America Automotive Synthetic Ester Lubricants Market Revenue (US\$ Million), 2021–2031

6.4 North America Automotive Synthetic Ester Lubricants Market Forecast Analysis

7. NORTH AMERICA AUTOMOTIVE SYNTHETIC ESTER LUBRICANTS MARKET VOLUME AND REVENUE ANALYSIS – BY PRODUCT TYPE

7.1 Engine Oil

7.1.1 Overview

7.1.2 Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.1.3 Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.2 MCO

7.2.1 Overview

7.2.2 MCO: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.2.3 MCO: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.3 PCMO

7.3.1 Overview

7.3.2 PCMO: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.3.3 PCMO: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.4 HDEO

7.4.1 Overview

7.4.2 HDEO: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.4.3 HDEO: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.5 Others Engine Oil

7.5.1 Overview

7.5.2 Others Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.5.3 Others Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.6 Hydraulic Oil

7.6.1 Overview

7.6.2 Hydraulic Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.6.3 Hydraulic Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.7 Gear Oil

7.7.1 Overview

7.7.2 Gear Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.7.3 Gear Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.8 Immersion Cooling Fluids

7.8.1 Overview

7.8.2 Immersion Cooling Fluids: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.8.3 Immersion Cooling Fluids: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.9 Refrigeration Oil

7.9.1 Overview

7.9.2 Refrigeration Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.9.3 Refrigeration Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.10 Grease

7.10.1 Overview

7.10.2 Grease: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.10.3 Grease: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.11 Metalworking Fluids

7.11.1 Overview

7.11.2 Metalworking Fluids: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.11.3 Metalworking Fluids: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

7.12 Others

7.12.1 Overview

7.12.2 Others: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

7.12.3 Others: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8. NORTH AMERICA AUTOMOTIVE SYNTHETIC ESTER LUBRICANTS MARKET VOLUME AND REVENUE ANALYSIS – BY END USE

8.1 Conventional Vehicles

8.1.1 Overview

8.1.2 Conventional Vehicles: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

8.1.3 Conventional Vehicles: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

8.2 Electric Vehicles

8.2.1 Overview

8.2.2 Electric Vehicles: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

8.2.3 Electric Vehicles: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

9. NORTH AMERICA AUTOMOTIVE SYNTHETIC ESTER LUBRICANTS MARKET – COUNTRY ANALYSIS

9.1 North America

9.1.1 North America Automotive Synthetic Ester Lubricants Market – Volume, Revenue, and Forecast Analysis – by Country

9.1.1.1 North America Automotive Synthetic Ester Lubricants Market Volume and Forecast Analysis – by Country

9.1.1.2 North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast Analysis – by Country

9.1.1.3 United States: North America Automotive Synthetic Ester Lubricants Market – Volume, Revenue, and Forecast, 2021–2031 (US\$ Million)

9.1.1.3.1 United States: North America Automotive Synthetic Ester Lubricants Market Share – by Product Type

9.1.1.3.2 United States: North America Automotive Synthetic Ester Lubricants Market Share – by End Use

9.1.1.4 Canada: North America Automotive Synthetic Ester Lubricants Market – Volume, Revenue, and Forecast, 2021–2031 (US\$ Million)

9.1.1.4.1 Canada: North America Automotive Synthetic Ester Lubricants Market Share – by Product Type

9.1.1.4.2 Canada: North America Automotive Synthetic Ester Lubricants Market Share – by End Use

9.1.1.5 Mexico: North America Automotive Synthetic Ester Lubricants Market – Volume, Revenue, and Forecast, 2021–2031 (US\$ Million)

9.1.1.5.1 Mexico: North America Automotive Synthetic Ester Lubricants Market Share – by Product Type

9.1.1.5.2 Mexico: North America Automotive Synthetic Ester Lubricants Market

Share – by End Use

10. COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis by Key Players

10.2 Company Market Share Analysis, 2024

11. INDUSTRY LANDSCAPE

11.1 Overview

11.2 Market Initiative

11.3 Partnerships and Collaborations

11.4 Other Developments

12. COMPANY PROFILES

12.1 China Petroleum & Chemical Corp (Sinopec)

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

12.1.6 Key Developments

12.2 Exxon Mobil Corp

12.2.1 Key Facts

12.2.2 Business Description

12.2.3 Products and Services

12.2.4 Financial Overview

12.2.5 SWOT Analysis

12.2.6 Key Developments

12.3 BP Plc

12.3.1 Key Facts

12.3.2 Business Description

12.3.3 Products and Services

12.3.4 Financial Overview

12.3.5 SWOT Analysis

12.3.6 Key Developments

12.4 Chevron Corp

12.4.1 Key Facts

- 12.4.2 Business Description
- 12.4.3 Products and Services
- 12.4.4 Financial Overview
- 12.4.5 SWOT Analysis
- 12.4.6 Key Developments
- 12.5 AMSOIL Inc
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Phillips
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 TotalEnergies SE
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 Valvoline Inc
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 Fuchs SE
 - 12.9.1 Key Facts
 - 12.9.2 Business Description
 - 12.9.3 Products and Services
 - 12.9.4 Financial Overview
 - 12.9.5 SWOT Analysis

12.9.6 Key Developments

12.10 Repsol SA

12.10.1 Key Facts

12.10.2 Business Description

12.10.3 Products and Services

12.10.4 Financial Overview

12.10.5 SWOT Analysis

12.10.6 Key Developments

13. APPENDIX

13.1 About Us

List Of Tables

LIST OF TABLES

Table 1. North America Automotive Synthetic Ester Lubricants Market Segmentation

Table 2. List of Vendors

Table 3. North America Automotive Synthetic Ester Lubricants Market –Volume and Forecast, 2021–2031 (Tons)

Table 4. North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Table 5. North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by Product Type

Table 6. North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million) – by Product Type

Table 7. North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by End Use

Table 8. North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million) – by End Use

Table 9. North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021–2031 (Tons) –by Country

Table 10. North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million) – by Country

Table 11. United States: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by Product Type

Table 12. United States: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Product Type

Table 13. United States: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by End Use

Table 14. United States: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by End Use

Table 15. Canada: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by Product Type

Table 16. Canada: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Product Type

Table 17. Canada: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by End Use

Table 18. Canada: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by End Use

Table 19. Mexico: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by Product Type

Table 20. Mexico: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by Product Type

Table 21. Mexico: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons) – by End Use

Table 22. Mexico: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021 – 2031 (US\$ Million) – by End Use

List Of Figures

LIST OF FIGURES

Figure 1. North America Automotive Synthetic Ester Lubricants Market Segmentation – Country

Figure 2. Porter's Five Forces Analysis

Figure 3. Impact Analysis of Drivers and Restraints

Figure 4. North America Automotive Synthetic Ester Lubricants Market Volume (Tons), 2021–2031

Figure 5. North America Automotive Synthetic Ester Lubricants Market Revenue (US\$ Million), 2021–2031

Figure 6. North America Automotive Synthetic Ester Lubricants Market Share (%) – by Product Type (2024 and 2031)

Figure 7. Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 8. Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 9. MCO: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 10. MCO: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 11. PCMO: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 12. PCMO: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 13. HDEO: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 14. HDEO: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 15. Others Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 16. Others Engine Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 17. Hydraulic Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 18. Hydraulic Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 19. Gear Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 20. Gear Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 21. Immersion Cooling Fluids: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 22. Immersion Cooling Fluids: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 23. Refrigeration Oil: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 24. Refrigeration Oil: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 25. Grease: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 26. Grease: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 27. Metalworking Fluids: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 28. Metalworking Fluids: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 29. Others: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 30. Others: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 31. North America Automotive Synthetic Ester Lubricants Market Share (%) – by End Use (2024 and 2031)

Figure 32. Conventional Vehicles: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 33. Conventional Vehicles: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 34. Electric Vehicles: North America Automotive Synthetic Ester Lubricants Market – Volume and Forecast, 2021 – 2031 (Tons)

Figure 35. Electric Vehicles: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021–2031 (US\$ Million)

Figure 36. North America Automotive Synthetic Ester Lubricants Market Breakdown, by Key Countries, 2024 and 2031 (%)

Figure 37. United States: North America Automotive Synthetic Ester Lubricants Market – Revenue and Forecast, 2021– 2031 (US\$ Million)

Figure 38. Canada: North America Automotive Synthetic Ester Lubricants Market –

Revenue and Forecast, 2021– 2031 (US\$ Million)

Figure 39. Mexico: North America Automotive Synthetic Ester Lubricants Market –

Revenue and Forecast, 2021– 2031 (US\$ Million)

Figure 40. Heat Map Analysis by Key Players

Figure 41. Company Market Share Analysis, 2024

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