

# Electric Vehicles Fluids: Market Analysis and Opportunities (Commercial Volume)

**Base Year: 2021**

**Published:  
Q3 2022**

**1<sup>st</sup> edition**

Accelerating decarbonization efforts in the commercial vehicle (CV) sector are promoting the deployment of low- and zero-emission technologies. Electrification remains a viable option for CV applications. Electrification of commercial vehicles will drive technological innovation, as performance requirements for the various fluids consumed in electric CVs are different from those used in conventional Internal Combustion Engine (ICE) vehicles. EVs will herald a new lubricants market niche focused on the lubrication needs of EVs specifically used in commercial applications.

**Regional Coverage:**

- China
- Europe
- United States
- Japan

## SCOPE

- › Assessment of the current and projected electric CV fleet in terms of overall size, technologies used, and key OEMs
- › Analysis of fluid requirements for different EV technologies
- › Assessment of the impact of various EV technologies such as e-drivelines and e-axles on EV fluid specifications and demand
- › Electric CV maintenance and fluid change practices and the resulting demand for electric CV fluids (including fuel cell vehicles)
- › Analysis of evolving dependencies among the various stakeholders in the electric commercial vehicle supply chain
- › Identification of market opportunities and challenges

**FEATURES CONSTRUCTION  
AND MINING SECTORS**

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## Introduction

### Executive Summary

An overview of the report findings

### Country Profiles

- Detailed profiles of four markets (listed in Table 1) will be provided, including the following information:

### Electric Commercial Vehicle Fleet Size and Growth

Description of current electric commercial vehicle fleet by:

- Major segment: on-highway, off-highway (construction and mining)
- Electric powertrain type: BEV, FCV, HEV/MHEV and PHEV
- Decarbonization policies and 2040 outlook

### Trends in Electric Commercial Vehicle Powertrain Technologies

Description of current and emerging EV architectures and trends in electric CVs

- Analysis of battery technology trends: optimization, energy density, new materials
- Description of thermal management systems including battery, e-motors
- Description of electric powertrain technologies and future technological development
- Technology focus of leading EV OEMs, introduction of new models, and their relationship with lubricants suppliers and Tier 1 suppliers

### Electric Vehicles Fluids Market Analysis

Engine oils, transmission fluids, coolants, and grease markets will be profiled, covering the topics listed below:

- Current and future OEM specifications
- Maintenance practices and drain intervals
- Overall demand and splits by factory fill versus service fill

### Market Appraisal

- Impact of technological evolution in electric vehicle fluids demand
- Implications for lubricants industry participants
- Market opportunities and challenges
- Long-term outlook (2040)

**TABLE 1. LIST OF COUNTRIES/REGIONS**

China
Europe (France, Germany, United Kingdom)
The United States
Japan



## REPORT BENEFITS

This report assists lubricants industry participants in identifying opportunities and challenges within the EV fluids market for commercial vehicles. It will also serve as an invaluable tool in the strategic planning process. Specifically, the report helps subscribers:

Develop an understanding of the emerging EV technologies that are reshaping the commercial vehicles fluids market

Assess current and future demand for various EV fluids in commercial vehicles fleets based on maintenance and fluid change practices

Understand the emerging performance requirements for electric CV fluids; design and develop products meeting these requirements

## METHODOLOGY

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