

ELECTRIC VEHICLES FLUIDS: MARKET ANALYSIS AND OPPORTUNITIES (COMMERCIAL VOLUME)

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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 CVs 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. Electric vehicles (EVs) will herald a new lubricants market niche focused on the lubrication needs of EVs specifically used in commercial applications.

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 various stakeholders in the electric CV supply chain
- Identification of market opportunities and challenges

Regional Coverage



China, Europe, Japan, United States

Features and Timing



Base Year: 2022

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2nd Edition

FEATURES OFF-HIGHWAY VEHICLES

TABLE OF CONTENTS

Introduction

Executive summary

An overview of the report findings including a succinct view of the global EV fluids market

Country Profiles

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

Enablers For the EV Transition

Description of current electric CV fleet by:

- Major segment: on-highway and off-highway (mining)
- Electric powertrain type: BEV, FCV, HEV/MHEV, and PHEV
- EV charging infrastructure
- Regulations and other decarbonization efforts promoting EV deployment

Trends in Electric CV Powertrain Technologies

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

- Analysis of battery technology trends: optimization, energy density, and new materials
- 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

EV Fluids Market Analysis

Profiles of engine oils, transmission fluids, coolants, and grease markets, 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 on EV fluids demand
- Implications for lubricants industry participants
- Market opportunities and challenges
- Long-term outlook (2050)

TABLE 1. LIST OF COUNTRIES/REGIONS

China

Europe (European Union countries + UK)

The United States

Japan

SUBSCRIBER BENEFITS

This study assists lubricants industry participants in identifying opportunities and challenges within the EV fluids market for CVs. 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 CV fluids market



Assess current and future demand for various EV fluids in CV 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



Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

New and Improved Forecasts



Kline's new enhanced forecasting capabilities combines the power of advanced data science techniques and industry expertise to predict future market metrics. We analyze economic, demographic, social media, and consumer trend indicators to identify the factors driving growth. Our algorithms refine predications, and our automated processes provide the latest data for informed decision-making.

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