

Transmission Fluid Market - Global Outlook and Forecast 2022-2027

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Report description:

The global transmission fluid market is expected to grow at a CAGR of 5.15% during 2022-2027.

Transmission fluid is a product that provides lubrication for the transmission assembly which consists of transmission, gearbox, and axle. It helps to reduce the friction and heat generated during the operation. As the gearbox runs at high speed it is necessary to provide good quality lubricant to avoid malfunction of the vehicle. Transmission fluid is essential to improve the vehicle's performance as the transmission transfers the power generated in the engine to the vehicle's wheels. Therefore, transmission fluid is the critical component offering smooth functioning of the transmission assembly. When transmission assembly is in operation, transmission fluid acts as a lubricant and protects the many moving parts such as clutch, gearbox, propeller shaft, differential and axle, and live axle. The transmission fluid market changes as the customers demand better-performing lubricants to enhance the fuel economy and deliver better performance. Transmission fluids are manufactured from mineral oils derived from crude oil in the past. However, as the automotive industry developed, the mineral oil-based transmission fluid could not perform as per the new engine and transmission requirements. Therefore, demand for synthetic oil-based transmission fluid and additives is increasing rapidly. Advancements in technology helped the transmission fluid industry cater to diverse needs such as increasing the shelf life of the transmission, reducing carbon footprint, improving fuel economy, supplying lubricants with low viscosity, and meeting the increasing vehicle emission standards. The growing use of passenger cars in emerging economies has fueled the transmission fluid market. The global transmission fluid market shipment is expected to grow at a CAGR of 4.16% during the forecast period.

MARKET TRENDS & DRIVERS

Increasing Demand for Passenger and Commercial Vehicles in Emerging Economies

The demand for commercial and passenger vehicles in India, China, Brazil, and South Korea is growing because of rapid development in the automotive and infrastructure industry. Over the past decades, the automotive market has developed immensely in R&D, production capacity, competitive standards, and continuous development. The infrastructure industry in

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emerging economies has proliferated because of low-cost labor, low-cost raw material, government subsidiaries, and high foreign direct investment (FDI). According to the International Organisation of Motor Vehicle Manufacturers (OICA), since 2005, the automobile industry has shown rapid growth in emerging economies because of rapid industrialization and increased foreign direct investment (FDI). Therefore, it has created well-paying jobs in emerging economies which has increased the buying power of customers. In addition, during the COVID-19 pandemic, demand for passenger cars had grown as people preferred private vehicles to travel instead of public transportation. Also, during the pandemic, the transport of food and medical supplies increased the demand for commercial vehicles.

OPPORTUNITIES

Rapid Growth in Electric Vehicle Market

Electric vehicle (EVs) runs on electric motors but transmitting the power from motors to wheel transmission assembly is required. Electric vehicle transmission assembly comprises a single or multi-gearbox and axle rod to transfer power. Therefore, even though EVs run on the electric motor, they still require some lubricant, such as transmission fluid, for better performance of the vehicle. Governments and many automotive manufacturers are focusing on electric cars to increase the production and use of electric vehicles.

Electric cars have become popular among customers because of rising crude oil prices; also, EVs help reach the environmental objectives. Additionally, electric vehicles are more efficient than conventional ICE vehicles. Electric vehicles help to reduce greenhouse gas emissions by up to a significant amount. Furthermore, EVs do not produce any exhaust, significantly reducing air pollution. Understanding the market scenario of EVs, many lubricant manufacturers such as Castrol (UK), Valvoline (US), Shell PLC (US), and TotalEnergies (France) have launched a new range of transmission fluids that are compatible with EVs. Therefore, an increase in the EV fluids market will increase the demand for transmission fluid.

CHALLENGES

Matured Market for Passenger Vehicles in Developed Economies

US, Germany, and Japan are the developed countries, and the passenger car market is matured in this region as most of the population owns at least one car per person. Therefore, no major driving factors will increase the demand for passenger cars. Consequently, it will affect the transmission fluid market. Additionally, the GDP growth in the developed countries such as the US, Germany, and Japan did not show a significant increase compared to India, Indonesia, and China. This slow growth in GDP affected the development of the passenger car market because when the economic conditions are good, people purchase more passenger cars. For the developed countries, economic conditions are not favorable for the passenger car market. According to the US Bureau of Transportation Statistics, the average number of vehicles in the household is 1.9. As per Worldatlas, Germany has 566 cars per 1000 people while China has 173 cars per 1000 individuals, Indonesia has 78 vehicles per 1000 individuals, and India has 225 cars per 1000 individuals. As per the data mentioned above, developed countries have a significantly high number of cars, and because of that, the demand for passenger cars has been steady in developed countries. The points mentioned above indicate that the passenger car market in developed nations like the US, Germany, and Japan is mature. Therefore, the demand for passenger cars is steady and will negatively impact the transmission fluid demand.

TRANSMISSION FLUID MARKET SEGMENT ANALYSIS

The Passenger car is expected to be the largest segment in the transmission fluid market. Transmission fluid is the most common automotive lubricant used in passenger cars. Transmission fluids play an essential role in the overall performance of vehicles with protection against wear and tear of moving parts in a transmission assembly. Transmission fluid oil consists of base oils and

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various additives, which give a broad spectrum of properties. The global transmission fluid products are widely used in multiple vehicles such as passenger cars, commercial vehicles, heavy vehicles, electric vehicles, hybrid vehicles, and others.

Transmission fluid is generally available in three oil types: entirely synthetic, semi-synthetic, and mineral oil. All three oil types have some advantages, but the fully synthetic oil-based transmission fluid is the largest oil type segment in the transmission fluid market. Synthetic lubricants are derived from Group III, Group IV, and Group V base oils. Fully synthetic oil is more expensive than mineral oil and semi-synthetic oil, which helps consumers get premium-quality transmission fluid. Entirely synthetic oils increase vehicle performance, excellent parts protection, and better fuel efficiency.

Segmentation by Applications

- Passenger Car
- Commercial Vehicle
- Heavy Vehicles
- Others

Segmentation by Oil Type

- Fully Synthetic Oil
- Mineral Oil
- Semi-Synthetic Oil

The global transmission fluid market is diverse, with many established and potential growth markets. APAC is the leading market for transmission fluid because of the low cost of labor and abundant availability of raw materials. Additionally, the automotive segment in the APAC region has shown significant growth in recent years, which is a major driving factor for the transmission fluid market. APAC will dominate the market through the forecast period. However, there are many countries with a high scope for expansion that will challenge the dominance of APAC.

Segmentation by Region

- North America
 - o□ US
 - o□ Canada
- Europe
 - o□ Germany
 - o□ France
 - o□ UK
 - o□ Spain
 - o□ Italy
 - o□ Russia
 - o□ Rest Of Europe
- APAC
 - o□ China
 - o□ India
 - o□ Japan
 - o□ South Korea
 - o□ Indonesia
 - o□ Rest of APAC
- Latin America

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- o□Brazil
- o□Mexico
- o□Rest Of Latin America
- Middle East & Africa
- o□Iran
- o□Saudi Arabia
- o□South Africa
- o□UAE
- o□Rest of MEA

COMPANY AND STRATEGIES

The key players have undertaken various strategies to grow in the transmission fluid market. Companies in the transmission fluid industry compete strategically. The growth in sustainable processes and initiative has been a challenge for all companies globally. Investments in R&D, technological advancement, and environmental and economic difficulties drive the demand for innovative and sustainable transmission fluid products.

Some major players in the market include Exxon Mobil Corporation (US), British Petroleum (UK), Shell (UK), Gulf Oil (US), Idemitsu (Japan), Castrol (US), Fuchs (Germany), and Chevron Corporation (US). These players have adopted expansion, acquisitions, new product development, joint ventures, and others to increase their revenues in the transmission fluid market.

The transmission fluid market is provided for the forecast years 2022 to 2027 and the base year of 2021. The market is segmented as per application, oil type, and geography for the years considered. The report provides a holistic approach to the transmission fluid market to enable customers to analyze the market efficiently.

For further information and clarification on the market, analyst discussion can also be arranged at the feasibility of the client.

Key Vendors

- Castrol Limited
- Chevron Corporation
- ExxonMobil
- Shell PLC
- TotalEnergies

Other Prominent Vendors

- Bharat Petroleum Corporation Limited
- BP PLC
- FUCHS
- Gazpromneft ? Lubricants Ltd
- GS Caltex Corporation
- Gulf Oil International limited
- Hindustan Petroleum Corporation Limited
- Idemitsu Kosan Co., Ltd.
- Indian Oil Corporation Limited
- Kuwait Dana Lubes Company
- Liqui Moly
- Motul
- Pennzoil

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- Petro-Canada Lubricant Inc.
- Petroliam Nasional Berhad (PETRONAS)
- Phillips 66
- Ravensberger Schmierstoffvertrieb GmbH (Ravenol)
- Repsol
- Sinopec
- Valvoline Inc.

KEY QUESTIONS ANSWERED

- 1.□HOW BIG IS THE TRANSMISSION FLUID MARKET?
- 2.□WHAT IS THE GROWTH RATE OF THE GLOBAL TRANSMISSION FLUID MARKET?
- 3.□WHAT ARE THE GROWTH FACTORS IN THE GLOBAL TRANSMISSION FLUID MARKET?
- 4.□WHO ARE THE KEY PLAYERS IN THE GLOBAL TRANSMISSION FLUID MARKET?
- 5.□WHICH REGION HOLDS THE LARGEST SHARE IN THE TRANSMISSION FLUID MARKET?

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