Cold Flow Improvers Market Report and Forecast 2025-2034

Market Report | 2025-07-21 | 155 pages | EMR Inc.

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Report description:

The global cold flow improvers market size reached a value of USD 1039.04 Million in 2024. The market is further expected to grow at a CAGR of 5.70% between 2025 and 2034 to reach a value of around USD 1808.76 Million by 2034.

News and Developments in the Cold Flow Improvers Market

In April 2023, Afton Chemical stated that GreencleanTM 3, its most recent innovation in diesel fuel detergent technology, would be available in North America. This potent, ground-breaking technology expands upon the popular, first-generation GreencleanTM platform. GreencleanTM 3 will continue to improve the performance of heavy-duty fleets and off-road vehicles, equipped with the newest engine and emission control technologies, due to its more powerful detergent system.

The advantages of GreencleanTM 3 Detergent Technology include defence against external and internal injector deposits, increased filterability, stability, emissions reduction, and fuel efficiency. In order to reduce the difficulty of managing various additives, this new platform also contains other additive combinations to suit performance objectives, such as lubricity, cetane, and cold flow improvers. Such innovations and technological advancements are acting as the major trends driving the growth of cold flow improvers market globally.

In June 2019, Purify Fuel and Solvay announced they have developed a fuel additive blend based on nanotechnology to improve fuel efficiency, boost power, regulate emissions, and reduce harmful emissions in current diesel-powered engines. Over 16 million new engines with identical nanotech combustion catalysts have been fitted with Solvay EOLYS Fuel Additives, a crucial part of Purify Fuel's fuel additive formulations (nanO2).

The nanO2 Fuel Additive Blends from Purify Fuel utilise Solvay's expertise in nanotechnology to produce diesel fuel additive blends that reduce hazardous emissions while increasing fuel efficiency. The nanO2 Fuel Additive Blends can reduce harmful emissions by up to 35-55%.

In May 2019, a new no-harm test for cold flow improvers was introduced by the German association for biodiesel quality management (AGQM) for use in biodiesel as a mix component in fuel. In order to ensure that blended biodiesel, diesel fuel, and cold flow improvers do not negatively interact with one another, AGQM devised a test procedure in partnership with the petroleum oil and additive industries.

The new cold flow improver no-harm test is broken down into two sections: tests in a B10 fuel specifically created for the no-harm test, which determines minimum requirements like lowering the cold filter plugging point (CFPP), flashpoint, ash content, total contamination, and interaction tests with other cold flow improvers.

In order to test the additive in the worst-case scenario for filterability, corrosion, engine oil compatibility, foam and emulsion formation, and XUD9 engine testing, it is claimed by AGQM that the test fuel will already contain significant amounts of diesel cold flow improvers and anti-settling agents. Such launches are expected to increase the cold flow improvers market share.\

Increasing Use in End-Use Industries, Environmental Concerns, Favourable Regulations to be the Major Factors Driving the Market Growth

Cold flow improvers are basically the polymers or lubricant additives that are used to regulate wax generation in pipelines and process units. It is also a type of diesel fuel treatment that keeps the paraffin wax content of the fuel from sticking together and keeps the fuel filter from jamming. A fuel's cold flow attribute indicates its ability in operating at low temperatures.

- The increasing demand for the product from different end-use industries is one of the major factors propelling the global cold flow improvers market growth.

- The product's capacity to prevent fuel component intermixing is also increasing their use in end-use industries.

- The development of viable and environmentally sustainable fuels like biodiesel has been aided by increased awareness of the scarcity of fossil fuel resources and environmental concerns, which is fuelling the market expansion.

- The market share is further driven by the government's favourable regulations and massive FDI investment in the automotive industry.

- The rise of the market is predicted to be accompanied by the continuous focus of automakers on increasing production output to meet worldwide demand in the near future.

Increasing Personal Vehicles, Investments in the Automobile Industry, Usage of Biofuels Likely to Offer Lucrative Growth Opportunities to the Market

Rapid Urbanisation

Rapid urbanisation in developed and developing countries and the rising demand from the automotive sector are anticipated to drive the cold flow improvers market growth.

Increasing Demand for Personal Vehicles

The demand for personal vehicles is rising as a result of rising disposable income. As a result, automakers are constantly working on increasing their manufacturing capacity to meet the growing demand for cars around the world, thereby spurring the development of cold flow improvers.

Growing Investments in the Automobile Industry

Growing investments in the automobile industry are also expected to increase the demand for these improvers, thereby propelling the market growth.

Growing Usage of Biofuels

The growing usage of biofuels as lubricants and diesel fuel extenders is predicted to improve the cold flow improvers market forecast.

Demand for Electric Cars and Alternative Fuels May Pose as Challenges for the Market

Rising Demand for Electric Cars

The increase in demand for electric vehicles and the growing incentive to use electric vehicles are expected to create barriers to the cold flow improvers market development during the forecast period.

Rising Demand for Alternative Fuels

The rising demand for alternative fuels is also restraining the growth of the global market.

Cold Flow Improvers Market Segmentation

The EMR's report titled "Cold Flow Improvers Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Type

- Ethylene Vinyl Acetate
- Fluorocarbon Vinyl Acetate
- Polyalpha Olefin
- Polyalkyl Methacrylate
- Others

Market Breakup by Application

- Diesel
- Aviation Fuel
- Lubricating Oil
- Marine Fuel
- Others

Market Breakup by End Use

- Automotive
- Commercial Aviation

- Marine
- Defence
- Others

Market Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Ethylene Vinyl Acetate, Fluorocarbon Vinyl Acetate, Polyalpha Olefin, and Polyalkyl Methacrylate are the Major Types

Due to its widespread use and deposition inhibitor qualities, ethylene-vinyl acetate is in high demand for cold flow improvers in products like diesel and aviation fuel.

Polyalkyl methacrylate is mostly used in the lubricating oil sectors and finished fuel due to its features, such as wax deposition inhibition at low temperatures, which restricts the accumulation and deposition of wax crystals in heavy and light vehicle engines. They are adaptable, as they can be mixed with fuels such as diesel and aviation fuel. These growing uses are one of the major cold flow improvers market trends globally.

Polyalphaolefin is one of the most common major synthetic base oils used in industrial and automotive lubricants. PAOs are widely used in automotive fluids, hydraulic gear and bearing oils, and other applications that need extreme cold or extreme heat. They are also used as basic fluids in some greases with a wide temperature range.

Cold Flow Improvers Find Extensive Applications in Diesel, Aviation Fuel, Lubricating Oil, and Marine Fuel

Based on application, the diesel segment is anticipated to dominate the cold flow improvers market globally. These improvers are needed in diesel to maintain its performance; therefore, diesel plays an important role.

Increased demand in a variety of end-use industries, including the automotive industry, and tougher biofuel standards are responsible for the segment growth. Diesel has higher energy efficiency and density than other combustible fuels and is safer; thus, it produces more useable energy per unit volume.

Cold Flow Improvers Finds its End-Uses in Automotive, Commercial Aviation, Marine, and Defence Sectors

The market demand for automobiles is mostly driven by global industrialisation, urbanisation, and economic expansion. As a result, the need for the improvers in lubricant additives to increase the former's resistance to low temperatures has increased in both European and American nations.

Also, increased consumer disposable income has prompted investors to make large investments in the automotive sector. Automobile manufacturers have increased production output to accommodate growth due to rising vehicle demand. Due to this, the need for cold flow improvers and lubricant additives is rising in the global automotive market.

The efficiency of fuel engines that operate at low temperatures is increased by these flow improvers, according to cold flow improvers market research. Since aircrafts frequently operate at below-freezing temperatures, where a fuel's flow qualities cannot

be maintained, the aviation sector makes substantial use of the cold flow improver. As a result, fuel and additives are combined to maintain the fuel's flow characteristics at very low temperatures, hence promoting the market expansion.

Asia Pacific to be the Leading Region in the Forecast Period

Asia Pacific is anticipated to be the leading region in the cold flow improvers market during the projected period as a result of the region's robust economic expansion and expanding finished fuel production capacity. Urbanisation and expanding populations in nations like China and India are also helping the industry grow.

Also, India Brand Equity Foundation (IBEF) predicts that the Indian automotive industry will be worth USD 251.4-282.8 billion by 2026. In addition, two-wheelers and passenger automobiles dominate the domestic Indian auto market. With approximately 20.1 million vehicles sold in FY20, passenger cars and two-wheelers accounted for 12.9 percent and 80.8 percent of the market share, respectively. Therefore, the growing automotive industry in Asia Pacific is accelerating the cold flow improvers market opportunity in the forecast period.

The rapid growth of end-use industries like automotive, aerospace, and defence, along with the growing use of polyalkyl methacrylate as cold flow improvers, are the main drivers of demand in this region. In the coming years, it is projected that rising demand for automobiles in developing nations like China, Japan, India, and South Korea will improve the market.

Europe and North America Expected to be the Significant Regional Markets

Europe and North America are expected to experience significant expansion in the global cold flow improvers market in the forecast period owing to the strong automobile and aviation industries in these regions and a significant demand for high-end vehicles. The market is expected to generate more revenues due to rapid industrialisation and increased disposable income in North America and Europe.

Additionally, compared to other places, the United States and Canada's consistently low temperatures can create attractive prospects for manufacturers of cold flow improvers. Further, key players in Europe are enhancing support and marketing services to fulfil regional market demand and growing their regional presence, which might have a favourable effect on the market growth.

Competitive Landscape

The comprehensive EMR report provides an in-depth assessment of the market based on the Porter's five forces model and giving a SWOT analysis. The report gives a detailed analysis of the following key players in the global cold flow improvers industry, covering their competitive landscape and latest developments like mergers, acquisitions, expansion and investments plans.

Ecolab Inc.

Ecolab Inc. is a global leader in water, infection and hygiene prevention services and solutions that help protect planet, people, and business health. The cold flow improvers by Ecolab provide efficient operational flexibility. It maximises the profitability of distillate pool by using their own additives to upgrade low value component streams and minimise the use of high value blend components.

Clariant International Ltd

Clariant International Ltd creates value for clients across a variety of sectors by providing creative and sustainable solutions. These include resource preservation, zero-emission transportation, and energy efficiency. The business is a top supplier of wax

anti-settling additives and middle distillate flow improvers (MDFI) for middle-distillates such home heating oil, diesel, and biofuels (WASA).

BASF SE (BASF)

BASF SE (BASF) is involved in the production, marketing, and selling chemicals, polymers, performance goods, and crop protection products. Fuel Additives, solvents, adhesives, surfactants, paints, pigments, food additives, fungicides, and herbicides are among the product categories. The company provides services to a variety of industries, including those in building, furniture and wood, agriculture, electronics and electrical, paints and coatings, automotive, home care, nutrition, and chemicals.

Afton Chemical Corporation

Afton Chemical Corporation, a subsidiary of New Market Corporation, creates and produces petroleum additives that improve the efficiency and cleanliness of fuel combustion, the smooth operation of engines, and the durability of machinery. The business offers driveline products, such as automotive gear oil and automatic transmission fluid additives, engine oil additives for industrial products, and engine oil additives for passenger car engines.

Evonik Industries AG

Evonik Industries AG is one of the top manufacturers of speciality chemicals. The company provides components, Evonik oil additives, and specialty additives for energy- and environmental-friendly system solutions for the construction, automotive, paints, coatings, adhesives, and other industries.

Infineum International Ltd.

Infineum International Ltd. is a speciality chemicals company that has significant research and development (R&D) skills in cutting-edge chemistry. The company is the global leader in petroleum additives for lubricants and fuels.

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