

Automotive Fuel Delivery System Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The automotive fuel delivery system market was valued at USD 3.77 billion in 2021 and is expected to reach USD 5.29 billion by 2027, registering a CAGR of above 5.8% during the forecast period (2022 - 2027).

Recent COVID-19 has disrupted the market growth. With lockdowns and travel restrictions, the demand for vehicles has declined. As a result, the growth of automotive parts in the automotive industry has also declined in the past two years. This trend is seen in all segments related to the automotive industry.

Over the medium-term, enactment of stringent emission control norms, especially for commercial vehicles, noise reduction, increased fuel efficiency, etc., have a notable impact on consumer behavior. However, increasing demand and the penetration of electric vehicles in the automotive sector are expected to hinder the growth of the market.

The drastic pressure variations in common rail injection systems are expected to reduce the emission of nitrogen dioxide by 50% and enhance fuel efficiency by 3%. On the other hand, the aftermarket kits, especially in the emerging markets, mainly drove the segment for liquefied petroleum vehicles. The lack of LPG-equipped models contributed to the high share of the aftermarket.

Asia-Pacific region is expected to lead in the automotive fuel delivery system market owing to growing automotive production across key markets like India, China, etc. CNG-powered vehicles are expected to witness strong growth in the European and North American regions. However, the growth in LPG vehicles is likely to be restricted to developing markets. Despite tough economic conditions in the South American region, the market should perform relatively well during the forecast period.

Automotive Fuel Delivery System Market Trends

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Increasing Demand for Commercial Vehicles to Enhance Demand in the Market

The rapid adoption of electrification in vehicles may hamper the growth of the automotive fuel delivery system market as the fuel delivery system transfers fuel from the tank to the internal combustion chamber in the cylinder head. The role of fuel delivery systems in Electric vehicles is not used.

Even though the automotive industry has experienced a slump due to COVID-19, electric vehicle (EV) sales are showing no signs of a slowdown, thanks to various socio-economic, environmental, and political factors working in their favor. The sales and the production of electric vehicles are expected to witness phenomenal growth, with most developed and developing countries trying to achieve zero emission standards by completely removing fossil fuel vehicles on roads. For instance,?

The government of India announced that it is planning to achieve 100% ZEVs in the country by the year 2030. With further incentives from authorities and the availability of better electric vehicles (increased range and decreased range anxiety), EV sales are further expected to rise globally.?

Governments across the world have initiated various schemes and initiatives which encourage a buyer to choose electric vehicles over conventional vehicles. Owing to such benefits, the growing sales of electric vehicles across the world tend to create a positive outlook for the development of the market over the forecasted period. For instance,?

A total of 2.65 million new EVs were sold during the first half of 2021, an increase of 168 % compared to the first half of 2020. The recent increases speak of hyper-growth but need to be seen relative to the low base of H1 2020. By 2021, all regions and most countries will witness strong increases in EV sales, with growth rates 3 to 8 times higher than for total light vehicle markets. The share of BEV and PHEV in global light vehicle sales increased from 3 % in 2020 Q1 to 6.3% in Q1 2021.?

In 2020, many European countries witnessed double-digit growth in EV sales. The European region captured around 43% of global electric car sales in 2020 compared to 26% in 2019. The overall plug-in vehicle sales reached about 3.24 million units compared to 2.26 million in 2019. This spike in sales is mainly due to increased regulatory norms by various organizations and governments to control emission levels and propagate zero-emissions vehicles.?

Such developments are expected to hinder the growth of the automotive fuel delivery system market over the forecast period.

Asia-Pacific Region Anticipated to Grow at Significant Level During the Forecast Period

The automotive fuel delivery system market is expected to witness robust growth across the Asia-Pacific region due to increasing sales of passenger and commercial vehicles in the coming years, especially in emerging economies such as India and China. Additionally, the increasing penetration of natural gas vehicles among many countries is also expected to positively impact the Asia-Pacific automotive fuel delivery system market in the coming years.

Despite an ongoing shortage in supplies of semiconductor chips that has affected every passenger vehicle maker in India, 2021 ended on a positive note. OEM wholesales increased 27.89 percent from January to December 2021 period to 30,38,922 units, up from 23,76,178 units sold in the same period of 2020. Other than Maruti, Hyundai, Renault, and Honda, every other OEM also posted a substantial increase in market share.

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Alternative fuels such as Liquefied Natural Gas (LNG) are being used in a few countries, wherein modifications in the fuel delivery system are required; hence with increasing penetration of LNG vehicles in the coming decade, the automotive fuel delivery system market is also expected to grow significantly.

In 2021, China imported more liquefied natural gas (LNG) than any other country, according to data from Global Trade Tracker and China's General Administration of Customs, as per US Energy Information Administration (EIA). Prior to 2021, Japan had been the world's largest LNG importer for decades, according to data from Cedigaz.

Therefore, such aforementioned factors and developments indicate a positive outlook for fuel delivery systems in vehicles during the forecast period.

Automotive Fuel Delivery System Market Competitor Analysis

The automotive fuel delivery system market is majorly dominated by Robert Bosch, Continental AG, Denso Corporation, Magna International, Keihin Corporation, and Magneti Marelli SPA, among others. The companies are expanding their businesses by forming joint ventures. The market is also witnessing the entry of new players.

In March 2022, the joint venture formed between Cummins Inc. and Rush Enterprises was renamed Cummins Clean Fuel Technologies (CCFT). The change is a result of acquiring 50% of Momentum Fuel Technologies (until now wholly owned by Rush Enterprises) by Cummins itself, which was announced in June 2021 and completed earlier in 2022. The joint venture will build on Momentum Fuel Technologies' compressed natural gas (CNG) fuel delivery systems and Cummins' experience in natural gas engines to develop an integrated natural gas system.

In June 2021, Pricol announced that it is developing a new range of fuel pump modules for Bajaj and a few other customers. This vertical has a significant amount of import dependence from China, and the company is actively working over the next 12 months. It will be able to localize a lot of the key import parts, thereby reducing our FOREX outflow.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

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- 4.1 Market Drivers
- 4.2 Market Restraints
- 4.3 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.3.1 Threat of New Entrants
 - 4.3.2 Bargaining Power of Buyers/Consumers
 - 4.3.3 Bargaining Power of Suppliers
 - 4.3.4 Threat of Substitute Products
 - 4.3.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD billion)

- 5.1 Vehicle Type
 - 5.1.1 Passenger Cars
 - 5.1.2 Commercial Vehicles
- 5.2 Fuel Type
 - 5.2.1 Gasoline
 - 5.2.2 Diesel
 - 5.2.3 Other Fuel Types
- 5.3 Geography
 - 5.3.1 North America
 - 5.3.1.1 United States
 - 5.3.1.2 Canada
 - 5.3.1.3 Mexico
 - 5.3.1.4 Rest of North America
 - 5.3.2 Europe
 - 5.3.2.1 Germany
 - 5.3.2.2 United Kingdom
 - 5.3.2.3 France
 - 5.3.2.4 Russia
 - 5.3.2.5 Spain
 - 5.3.2.6 Rest of Europe
 - 5.3.3 Asia-Pacific
 - 5.3.3.1 China
 - 5.3.3.2 Japan
 - 5.3.3.3 India
 - 5.3.3.4 South Korea
 - 5.3.3.5 Rest of Asia-Pacific
 - 5.3.4 Rest of the World
 - 5.3.4.1 Brazil
 - 5.3.4.2 Argentina
 - 5.3.4.3 South Africa
 - 5.3.4.4 Other Countries

6 COMPETITIVE LANDSCAPE

- 6.1 Vendor Market Share
- 6.2 Company Profiles*
 - 6.2.1 Robert Bosch GmbH
 - 6.2.2 Continental AG

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- 6.2.3 Delphi Technologies
- 6.2.4 DENSO Corporation
- 6.2.5 Keihin Corporation
- 6.2.6 Magna International Inc.
- 6.2.7 TI Fluid Systems
- 6.2.8 TOYODA GOSEI CO., LTD.
- 6.2.9 Ucal Fuel Systems Limited
- 6.2.10 Magneti Marelli Corporation

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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