

Automotive Fuel Filter Market - Growth, Trends, Covid-19 Impact, and Forecast (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

Key Highlights

The automotive fuel filter market was valued at USD 22 billion and is expected to reach USD 28 billion while registering a CAGR above 4% during the forecast period.

The COVID-19 pandemic compelled about 95% of all automotive-related companies to put their workforces on hold during the lockdowns, especially in the first half of 2020. Globally, the repercussions of the lockdown have been immense and unprecedented due to the halt of manufacturing activities.

However, post the pandemic-associated lockdown, vehicle production witnessed significant growth in the second half of 2020 and continued growth in 2021. However, vehicle sales and production in the year 2021 could not rebound to their level of 2019, primarily attributed to the global semiconductor shortage. Although, the market is anticipated to hamper during the forecast period, primarily attributed to growing sales of battery electric vehicles.

Over the long term, significant expansion of the automotive industry and favorable economic reforms in developing countries will likely boost the automotive fuel filter market. Moreover, rising concerns about the environment and stringent emission standards applicable to the automotive industry enacted by regulatory bodies are anticipated to drive the automotive fuel filter market demand. According to the United States Environmental Protection Agency, there has been a proposal to amend the greenhouse emission standard and corporate average fuel economy (CAFE) standard for vehicle models covering cars and light commercial vehicles.

Though, on the other hand, increasing adoption of electric vehicles is expected to restrain the market's growth, advancements in automotive fuel filters, on the other hand, can propel the market's growth during the forecast period. Moreover, aftermarket prospects will likely remain critical for industry participants due to the shorter replacement cycle. Furthermore, rising global vehicle production is expected to open up more fuel filter opportunities in the automotive filter aftermarket shortly.

Geographically, Asia-Pacific is expected to dominate the market owing to rising sales and production of vehicles in the region.

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North America and Europe are also likely to witness optimistic growth due to increasingly stringent emission regulations in the regions.

Automotive Fuel Filter Market Trends

Surging Demand for Electric Vehicles to hinder growth of Market

As the transition toward clean mobility intensifies worldwide, the adoption of electric vehicles has soared in a commensurate manner. According to EV-Volumes data, 1.3 million battery electric vehicles were sold in Europe in 2021. This represents a 65 percent increase in battery electric vehicle sales in the region in 2020. Between 2016 and 2021, the global volume of battery electric vehicles sold increased steadily.

The automotive fuel filter market's growth is likely to be hit due to the increasing demand for electric vehicles, as these filters are primarily utilized in conventional, fossil fuel-driven vehicles. The heavy reliance of vehicle manufacturers on automotive filters to minimize carbon emissions will thus prove counterproductive for this market, as the growing adoption of electric vehicles will lower the incentives for manufacturers to produce and deploy these components. As a result, the growth of this market will suffer in the process.

Electric vehicles do not require oil changes or fuel tanks, as no fuel is used to power the engines. As a result, the filter's application is restricted to purifying the energy within the vehicle. The limited scope of filter application in electric vehicles may have a negative impact on automotive filter fuel sales in the coming years.

Furthermore, as leading countries worldwide promote electric mobility and implement various policies, such as fuel economy standards in conjunction with incentives for zero- and low-emission vehicles, demand for electric vehicles is expected to outpace conventional vehicles. As a result of increasing demand for electric vehicles stifling traditional vehicle growth, the growth of automotive filters is impacted during the forecast period.

Asia-Pacific dominating the Fuel Filter Market

In terms of geographical regions, Asia-Pacific is expected to lead the automotive fuel filter market, followed by Europe and North America. The fuel filter market is expected to be driven by rising vehicle production in major countries such as China, Japan, and India.

Regional automakers have been investing in new technologies to augment the production of vehicles, which is stoking the adoption of filters in this region. Moreover, owing to the rapid expansion and enlargement of the auto manufacturing sector in India and China, the demand for automotive filters will likely go up during the forecast period.

In addition, accelerated urbanization and escalating pollution levels in this region will also promote the uptake of automotive filters. In North America, the market will be primarily driven by the increasing stringency of emission regulations. Automotive engine technologies in North America are becoming increasingly sophisticated, and supplying clean fuel to these complex engines is critical.

Fuel filters are an integral part of conventional engine vehicles, as they filter the fuel and play a major role in engine efficiency and emissions. Since stringent emission and fuel efficiency norms have been enforced by governments and governing bodies in the region, automotive manufacturers are now compelled to seek different methods to meet these standards. This is driving the demand for automotive fuel filters in these regions.

For instance, in August 2022, in China, Xi'an Cummins Engine Co., Ltd., a division of Cummins Inc. (Cummins), saw the Xiaoxiang M15 15L engine roll off the assembly line. Customers can change their engine oil every 150,000 kilometers owing to the NanoNet fuel filters.

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Automotive Fuel Filter Market Competitor Analysis

The market is dominated by key players, such as Denso Corporation, Parker Hannifin Corp, Mahle GmbH, Mann+Hummel, and Cummins Ltd. The major companies are investing in expanding their business by opening new production plants, conducting product launches, and getting into new contracts in the market.

For instance, in October 2022, Sogefi S.p.A (Sogefi) announced that during the first nine months of 2022, the Filtration division obtained contracts for the supply of air purification filters and oil and fuel module filters.

Additional Benefits:

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

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