

Automotive Cylinder Liner Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Automotive Cylinder Liner market is valued at USD 4,678.83 million currently. It is expected to surpass a net valuation of USD 5,823.19 million, registering a solid CAGR growth of 4.47% during the forecast period.

COVID-19 had a negative impact on almost all segments of the automotive industry, including passenger and commercial vehicles. Due to the lockdowns and halted production, the demand for automotive cylinder liners increased. But with life returning to normalcy, the auto sector is gaining pace that will help the automotive cylinder liner market grow in the forecast period.

Moreover, growing vehicle sales globally would elevate the market potential over the medium-term period. Some of the companies are announced for investment and expansion in the upcoming years to gain market share in the competitive era. For instance:

Key Highlights

In April 2022, Toyota Motor North America announced that it would invest USD 383 million across four United States plants to develop a new four-cylinder engine variant for its hybrid and traditional powertrains. Engine production must include the entire engine assembly, including the engine head, liner, and other components.

In February 2022, Cummins Inc. announced the expansion of its industry-leading powertrain platforms to include a wide range of lower-carbon fuel types. Furthermore, these platforms will make use of engine blocks and other key components that share common architectures and will thus be tailored to improve fuel efficiency.

The automotive cylinder liner market is expected to witness high growth over the forecast period. Developing nations may

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account for a significant percentage of internal combustion engines, while there is even spread throughout cylinder liners. Growth in eco-friendly vehicles impedes the growth of gas-driven automobiles, which inadvertently reduces the prospects of cylinder liners.

North America is the largest region that is expected to dominate the consumption of automotive cylinder liners market. This is attributed to the widely spread product bases of key engine manufacturers who are ruling the area. The United States is sourcing raw materials and engine components from China, Japan, and other economies to assemble them under the complete engine chamber. Moreover, with rising automotive sales and auto production, the region's demand for cylinder liners is expected to remain high.

Automotive Cylinder Liner Market Trends

Electric Vehicle may Hinder the Growth of the Market During Forecast Period

Electric mobility is becoming more popular among governments across the world. Government regulations to phase out fossil fuel-powered vehicles, government expenditures to improve public EV charging infrastructure, and initiatives in the form of subsidies and tax refunds to encourage the adoption of EVs are all likely to contribute to market development. Governments are investing in charging infrastructures directly in public charging stations or indirectly by subsidizing private charging stations at homes and workplaces.

Due to numerous advanced technological developments, electric vehicles' sales and production have witnessed tremendously rapid growth. The manufacturing companies have undertaken R&D concerning these vehicles' design, range, and maintenance.

As the demand for electric vehicles is growing worldwide, governments from all regions are taking initiatives to accelerate the shift of their nation's vehicle fleet from combustion to electric drive. Thus, this has led to rapid growth in the sales of electric vehicles. For instance:

During the end of FY21, Hyundai sold 313,926 cars globally in March. The sales statistics stood at a drop of 17% compared to previous years. The sales were even less than in Q1 2021. Moreover, Hyundai observed that its automotive segment witnessed a sharp rise, with almost doubled sales figures for its all-electric cars. This, in turn, makes its sales figure for its BEV to stand at 11,447 units, with a rise of 105%. In addition, plug-in electric cars increased to 14,693 units to 58% year and year growth. In Q1, 2022, Volkswagen Group, which includes Volkswagen, Audi, Porsche, Skoda, and SEAT, reported net sales of 99,100 units under its BEV segment. This showcases a steep rise of 65.2 % year-on-year growth rate. In FY2021, Volkswagen Group sold a record-breaking number of its plug-in electric vehicles, roughly 762,400 units.

China has also witnessed a steady rise in the BEV segment driven by top Chinese manufacturers, including Wuling HongGuang, Tesla, BYD, Nissan, Toyota, and Honda. The Chinese government has constantly provided regulated incentive programs to elevate EV sales.

The increasing environmental concerns from the regulating authorities and their plans to increase the number of ZEVs pose a threat to the existing internal combustion engines and, consequently, to the cylinder liners during the forecast period.

North America to Hold Largest Market Share During Forecast Period

The North American cylinder liner market is witnessing elevated sales owing to expanding auto sector of the United States and Canada. Both countries are fuelling vehicle sales, generating a significant amount of engine demand.

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The United States is one of the largest automotive markets worldwide, owing to its large-scale domestic production, with the major global players having their production plants in the United States. There are thirteen major car manufacturers in the United States. The presence of some of the prominent automotive manufacturers in the country is another major factor that is expected to propel the automotive steering sensor market. Being a technologically advanced country with established manufacturing capabilities, the United States is one of the key countries in the automotive power steering market.?

In April 2022, the United States reported new vehicle sales of 1,256, 224 units, with an 18% decline compared to April 2021 figures. In addition, during April, passenger car sales dropped to 23.3%, reporting 278,827 units, while SUV and truck sales decreased by 16.3% to 977,397 units. Q1 2022 has been less favorable for the United States automotive sector.

The United States is a major automobile market worldwide, with the presence of many auto manufacturers, like General Motors, FCA, and Paccar. The country manufactures more than 10 million vehicles annually. The United States houses key engine manufacturers in the country who are leading the development and manufacturing of engines that will fuel the demand for cylinder liners used in engine blocks. For instance:

In April 2022, Toyota announced an investment of USD 383 million in four of its United States manufacturing plants to support the production of its four-cylinder engines, including hybrid electric vehicles. In addition, Toyota Alabama in Huntsville plant received USD 222 million to expand 114,000 square feet and install a new four-cylinder production line to produce engines for both combustion and hybrid electric powertrains.

In February 2022, Cummins Inc. announced the expansion of leading powertrain platforms to include a range of lower-carbon fuel types. In addition, the new platforms will use engine blocks and core components that share common architectures to optimize different low-carbon fuel types.

Several major OEMs are partnering with technology companies, launching engines, and innovating new technologies to witness improved sales. For instance:

In August 2022, Xi'an Cummins Engine Co., Ltd., a division of Cummins Inc. in China, rolled off the 15L Xiaoxiang M15 engine and set up a new factory operation that can now produce 100,000 engines annually.

Although Canada has entered the list of countries that intend to prohibit the sale of internal combustion engine cars, by 2035, all new passenger car sales in Canada will be of zero-emissions versions, according to the country's emissions reduction plan. By 2026 and 2030, the government will gradually increase pressure on automakers to sell "at least" 20 percent of zero-emission vehicles. In contrast to this, the country is providing incentives of CAD 1.7 billion (or USD 1.36 billion) for purchasing electric cars and other zero-emission vehicles. This could restrain the demand growth for cylinder liners over the coming decades.

Based on the factors mentioned above, vehicle sales in North America and OEM's forefront demand for cylinder lines in the region are expected to witness a moderate growth rate during the forecast period.

Automotive Cylinder Liner Market Competitor Analysis

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The automotive cylinder liner market is moderately fragmented, with a handful of organized and unorganized players ruling the business. Some of the major players dominating the cylinder liner market are Mahle GmbH, Federal Mogul LLC, GKN China Holding Co. Ltd, Darton International Inc., and ZYNP, among others. Major manufacturers are investing heavily in the R&D of automotive cylinder liners to increase their profits and the efficiency of the products.

Companies are keeping longer-term supplies with key raw material providers to keep them apart from raw material procurement risks. This has helped the company to witness a seamless supply of material for producing cylinder liners. For instance:

In October 2022, A well-known English sportscar manufacturer placed an order for V8 engine blocks with Rheinmetall AG's Castings business unit, a joint venture between Rheinmetall and HUAYU Automotive Systems Co. Ltd. The horsepower output of the V8 engines is close to four figures.

In March 2021, A well-known German automaker gave Rheinmetall AG a follow-up order worth more than EUR 100 million to construct aluminum engine blocks. The start of full-scale production is anticipated for 2023. Beyond 2030, the contract's term continues.

Additional Benefits:

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

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