

Global Vehicle Auxiliary Power Unit (APU) Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G0A58C13BFB2EN.html>

Date: May 2026

Pages: 133

Price: US\$ 4,480.00 (Single User License)

ID: G0A58C13BFB2EN

Abstracts

The global Vehicle Auxiliary Power Unit (APU) market size is expected to reach \$ 1121 million by 2032, rising at a market growth of 10.7% CAGR during the forecast period (2026-2032).

In 2025, global Vehicle Auxiliary Power Unit (APU) production reached approximately 60,141 units, with an average global market price of around US\$ 9059 per unit. Gross margin is about 46%. The cost is 4,892 usd, the production is 80,000 units. A Vehicle Auxiliary Power Unit (APU) is a self-contained secondary power system installed on a vehicle to provide electrical power, thermal energy, or mechanical drive when the main engine is turned off or operating under low load conditions. APUs can be powered by diesel engines, batteries, gas turbines, or fuel cells and are widely used in commercial trucks, military vehicles, construction equipment, and specialty vehicles to improve energy efficiency, reduce fuel consumption, and support extended idle or stationary operations.

Electrification and Low-Emission Technologies Accelerate Development

With the increasing electrification of vehicles and stricter emission regulations, APUs are transitioning from traditional diesel-powered systems to battery-powered, fuel cell-powered, and hybrid APUs. These systems can provide stable power when the vehicle is parked or operating at low speeds, while reducing fuel consumption, noise, and emissions, making them particularly suitable for new energy commercial vehicles and future electric military vehicles.

High Power Density and Lightweight Design Trends Are Prominent

Future APUs will place greater emphasis on increasing power density and optimizing size and weight. By adopting efficient engines, small gas turbines, power electronics integration, and advanced materials, APUs can deliver higher output power in a smaller space, thus meeting the space utilization and mobility requirements of modern vehicles.

Integrated Energy and Multifunctional Development

APUs are evolving from single power generation units to integrated energy modules that can simultaneously provide electricity, thermal management, air conditioning, hydraulics, or battery charging. This integrated system design helps reduce the complexity of the overall vehicle energy system, improves reliability, and supports the continuous operation of high-power electronic devices and onboard systems.

Increased Demand for Quiet Operation and Stealth (Military and Special Vehicles)

In the military and special vehicle sectors, APU development focuses on low noise, low heat signature, and long-term silent power supply capabilities. Battery APUs or fuel cell APUs can maintain critical system operation even when the engine is off, improving vehicle stealth and battlefield survivability.

Integration with Intelligent and Energy Management Systems

In the future, APUs will be deeply integrated with vehicle energy management systems (EMS), remote monitoring, and predictive maintenance technologies to achieve load optimization, automatic start-stop, and real-time monitoring of operating status. This not only improves energy efficiency but also reduces maintenance costs and extends system lifespan.

This report studies the global Vehicle Auxiliary Power Unit (APU) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Vehicle Auxiliary Power Unit (APU) and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Vehicle Auxiliary Power Unit (APU) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Vehicle Auxiliary Power Unit (APU) total production and demand, 2021-2032, (Units)

Global Vehicle Auxiliary Power Unit (APU) total production value, 2021-2032, (USD Million)

Global Vehicle Auxiliary Power Unit (APU) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Vehicle Auxiliary Power Unit (APU) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Vehicle Auxiliary Power Unit (APU) domestic production, consumption, key domestic manufacturers and share

Global Vehicle Auxiliary Power Unit (APU) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Vehicle Auxiliary Power Unit (APU) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Vehicle Auxiliary Power Unit (APU) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Vehicle Auxiliary Power Unit (APU) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Elbit System, Safran (Microturbo), Jenoptik, Dewey Electronics, The Marvin Group, Thermo King, Aerosila, Carrier ComfortPro, Green APU, AMETEK, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Vehicle Auxiliary Power Unit (APU) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Vehicle Auxiliary Power Unit (APU) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Vehicle Auxiliary Power Unit (APU) Market, Segmentation by Type:

Air-cooled Type

Water-cooled Type

Global Vehicle Auxiliary Power Unit (APU) Market, Segmentation by Structure:

Integrated APU

External APU

Global Vehicle Auxiliary Power Unit (APU) Market, Segmentation by Vehicle:

Main Battle Tank APU

Armored Fighting Vehicle APU

Military Truck APU

Unmanned Ground Vehicle APU

Global Vehicle Auxiliary Power Unit (APU) Market, Segmentation by Application:

For Civilian

For Military

Companies Profiled:

Elbit System

Safran (Microturbo)

Jenoptik

Dewey Electronics

The Marvin Group

Thermo King

Aerosila

Carrier ComfortPro

Green APU

AMETEK

Tepas

Go Green APU

Vikas Group

Dynasys

NERO Industry

Key Questions Answered:

1. How big is the global Vehicle Auxiliary Power Unit (APU) market?
2. What is the demand of the global Vehicle Auxiliary Power Unit (APU) market?
3. What is the year over year growth of the global Vehicle Auxiliary Power Unit (APU) market?
4. What is the production and production value of the global Vehicle Auxiliary Power Unit (APU) market?
5. Who are the key producers in the global Vehicle Auxiliary Power Unit (APU) market?
6. What are the growth factors driving the market demand?

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