

Automotive Pump Market by Pump Type, Technology (Electric, Mechanical), Displacement Type, Vehicle Type, Sales Channel (OEM, Aftermarket), EV Type (BEV, HEV, PHEV, FCEV), Off-Highway Vehicles, Application, and Region - Global Forecast to 2035

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Abstracts

The global automotive pump market is projected to grow from USD 12.24 billion in 2024 to USD 12.96 billion in 2035, at a CAGR of 0.5% from 2024-2035.

The automotive pump market is expected to be largely driven by the aftermarket segment in the next 5-6 years. Countries such as India, Japan, and the US, which still rely heavily on ICE, HEV, and PHEV vehicles, are expected to see strong market growth. Commercial vehicles are also expected to maintain steady demand, given the slower pace of electrification in that segment.

“Mechanical pumps segment is expected to lead the of automotive pump market during the forecast period.”

Mechanical pumps are typically more cost-effective and simpler to install than electric pumps due to their straightforward design and reliance on fewer electronic components. Their integration into internal combustion engine (IC) vehicles is seamless, as IC engines already have belt-driven systems that can easily power these pumps. Additionally, mechanical pumps are highly reliable and efficient, which makes them a preferred choice in conventional vehicle setups. Their established usage in IC vehicles further reduces complexity, providing manufacturers with a more familiar and proven option.

“BEV segment is expected to lead the automotive pump market during the forecast

period.”

BEVs hold around 69% of the total EV market share in 2023 and are expected to reach around 80% in overall EVs by 2030. These vehicles employ two or three water pumps, essential for cooling various components, such as the battery pack and electric motor. They maintain their temperature to prevent overheating and ensure efficient operation. BEVs also use windshield, vacuum, and headlight washer pumps. This is, in turn, expected to drive the market for automotive pumps during the forecast period. As BEVs do not use traditional fuel systems, there is a projected reduction in demand for oil transmission pumps and fuel pumps with the growth of BEVs.

“Europe is expected to have a significant market share in the automotive pump market during the forecast period.”

The European automotive pump market is growing due to the increasing focus on emission norms, and rising demand for electric and luxury vehicles. Furthermore, the market's rise in Europe can be ascribed to the region's robust automotive production and the ambitions of Chinese OEMs such as BYD to establish manufacturing operations there. Leading automotive pump manufacturers in the region include Robert Bosch GmbH, Continental AG, Valeo, SHW AG, and ZF Friedrichshafen AG. These manufacturers provide automobile pumps to major OEMs worldwide.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: Tier I - 52%, Tier II - 21%, and OEM – 27%

By Designation: C- Level Executives - 47%, Directors - 37%, and Others - 16%

By Region: Asia Pacific - 36%, North America – 26%, Europe – 32%, and Rest of the World – 6%

The automotive pump market is dominated by major players, including Denso Corporation (Japan), Aisin Corporation (Japan), Continental AG (Germany), Robert Bosch GmbH (Germany), and Mitsubishi Electric Corporation (Japan). These companies are expanding their portfolios to align with the EVs, aiming to strengthen their automotive pump market ecosystem position.

Research Coverage:

The report covers the automotive pump market in terms of Pump Type, Technology (Electric, Mechanical), Displacement Type, Vehicle Type, Sales Channel (OEM, Aftermarket), EV Type (BEV, HEV, PHEV, FCEV), Off-Highway Vehicles, Application, and Region. It covers the competitive landscape and company profiles of the major automotive pump market ecosystem players.

The study also includes an in-depth competitive analysis of the key market players, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants with information on the closest approximations of revenue numbers for the overall automotive pump market and its subsegments.

This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies.

The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report also helps stakeholders understand the current and future pricing trends of the automotive pump market.

The report provides insight on the following pointers:

Analysis of key drivers (Global shift toward fuel-efficient vehicles, Stringent emission control norms by regulatory authorities, Trend of engine downsizing, and Surge in demand for lightweight automotive components), restraints (Rising demand for electric vehicles, and Rapid adoption of electric power steering in passenger cars), opportunities (Extensive use of ethanol fuel in automotive industry, Increased preference for electric water pumps, Rise of plug-in hybrid electric vehicle sales, and Growing demand for exhaust gas recirculation), and

challenges (High cost of electrification of automotive pumps, and Decline in aftermarket growth).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the automotive pump market.

Market Development: Comprehensive information about lucrative markets - the report analyses the automotive pump market across varied regions.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive pump market.

Competitive Assessment: In-depth assessment of market share, growth strategies, and service offerings of leading players like Denso Corporation (Japan), Aisin Corporation (Japan), Continental AG (Germany), Robert Bosch GmbH (Germany), and Mitsubishi Electric Corporation (Japan) among others in automotive pump market.

Contents

1 INTRODUCTION

- 1.1 STUDY OBJECTIVES
- 1.2 MARKET DEFINITION
 - 1.2.1 INCLUSIONS AND EXCLUSIONS
- 1.3 STUDY SCOPE
 - 1.3.1 MARKETS COVERED
 - 1.3.2 YEARS CONSIDERED
- 1.4 CURRENCY CONSIDERED
- 1.5 STAKEHOLDERS
- 1.6 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

- 2.1 RESEARCH DATA
 - 2.1.1 SECONDARY DATA
 - 2.1.1.1 Secondary sources
 - 2.1.1.2 Key data from secondary sources
 - 2.1.2 PRIMARY DATA
 - 2.1.2.1 Primary interviewees
 - 2.1.2.2 Breakdown of primary interviews
 - 2.1.2.3 List of primary participants
- 2.2 MARKET SIZE ESTIMATION
 - 2.2.1 BOTTOM-UP APPROACH
 - 2.2.2 TOP-DOWN APPROACH
- 2.3 DATA TRIANGULATION
- 2.4 FACTOR ANALYSIS
- 2.5 RESEARCH ASSUMPTIONS
- 2.6 RESEARCH LIMITATIONS
- 2.7 RISK ASSESSMENT

3 EXECUTIVE SUMMARY

4 PREMIUM INSIGHTS

- 4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE PUMP MARKET

- 4.2 AUTOMOTIVE PUMP MARKET, BY TYPE
- 4.3 AUTOMOTIVE PUMP MARKET, BY VEHICLE TYPE
- 4.4 AUTOMOTIVE PUMP MARKET, BY TECHNOLOGY
- 4.5 AUTOMOTIVE PUMP MARKET, BY DISPLACEMENT
- 4.6 AUTOMOTIVE PUMP MARKET, BY EV TYPE
- 4.7 AUTOMOTIVE PUMP MARKET, BY APPLICATION
- 4.8 AUTOMOTIVE PUMP MARKET, BY SALES CHANNEL
- 4.9 AUTOMOTIVE PUMP MARKET, BY REGION

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

5.2.1 DRIVERS

- 5.2.1.1 Global shift toward fuel-efficient vehicles
- 5.2.1.2 Stringent emission control norms by regulatory authorities
- 5.2.1.3 Trend of engine downsizing
- 5.2.1.4 Surge in demand for lightweight automotive components

5.2.2 RESTRAINTS

- 5.2.2.1 Rising demand for electric vehicles
- 5.2.2.2 Rapid adoption of electric power steering in passenger cars

5.2.3 OPPORTUNITIES

- 5.2.3.1 Extensive use of ethanol fuel in automotive industry
- 5.2.3.2 Increased preference for electric water pumps
- 5.2.3.3 Rise of plug-in hybrid electric vehicle sales
- 5.2.3.4 Growing demand for exhaust gas recirculation

5.2.4 CHALLENGES

- 5.2.4.1 High cost of electrification of automotive pumps
- 5.2.4.2 Decline in aftermarket growth

5.3 PORTER'S FIVE FORCES ANALYSIS

5.3.1 THREAT OF SUBSTITUTES

5.3.2 THREAT OF NEW ENTRANTS

5.3.3 BARGAINING POWER OF BUYERS

5.3.4 BARGAINING POWER OF SUPPLIERS

5.3.5 INTENSITY OF COMPETITIVE RIVALRY

5.4 PESTLE ANALYSIS

5.5 BILL OF MATERIALS

5.6 KEY STAKEHOLDERS AND BUYING CRITERIA

5.6.1 KEY STAKEHOLDERS IN BUYING PROCESS

- 5.6.2 BUYING CRITERIA
- 5.7 ECOSYSTEM ANALYSIS
 - 5.7.1 ORIGINAL EQUIPMENT MANUFACTURERS (OEMS)
 - 5.7.2 AUTOMOTIVE PUMP MANUFACTURERS
 - 5.7.3 AUTOMOTIVE PUMP COMPONENT SUPPLIERS
 - 5.7.4 AFTERMARKET SUPPLIERS
- 5.8 VALUE CHAIN ANALYSIS
- 5.9 PRICING ANALYSIS
 - 5.9.1 AVERAGE SELLING PRICE TREND, BY TYPE
 - 5.9.2 AVERAGE SELLING PRICE TREND, BY REGION
- 5.10 TECHNOLOGY ANALYSIS
 - 5.10.1 KEY TECHNOLOGIES
 - 5.10.1.1 IoT-based vehicles
 - 5.10.1.2 Electric power steering
 - 5.10.1.3 New fuel pump modules
 - 5.10.2 COMPLEMENTARY TECHNOLOGIES
 - 5.10.2.1 Digital twin
 - 5.10.2.2 Machine learning
 - 5.10.3 ADJACENT TECHNOLOGIES
 - 5.10.3.1 Power trends in electric coolant pumps
 - 5.10.3.2 Electric coolant pumps with non-sealed pump materials
 - 5.10.3.2.1 Shaft materials
 - 5.10.3.2.2 Bearing materials
- 5.11 INVESTMENT AND FUNDING SCENARIO
- 5.12 PATENT ANALYSIS
- 5.13 TRENDS AND DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES
- 5.14 CASE STUDY ANALYSIS
 - 5.14.1 ELECTRIC WATER PUMPS BY GATES CORPORATION
 - 5.14.2 E-WATER PUMPS BY CONCENTRIC AB
 - 5.14.3 HIGH-PERFORMANCE WATER PUMPS BY ADVANCED TEST AND AUTOMATION INC.
 - 5.14.4 GEAR-TYPE OIL PUMPS BY NATIONAL NATURE SCIENCE FOUNDATION OF CHINA
 - 5.14.5 HIGH-POWER COOLING WATER PUMPS BY HUBEI PROVISIONAL DEPARTMENT OF SCIENCE AND TECHNOLOGY
- 5.15 TRADE DATA
- 5.16 KEY CONFERENCES AND EVENTS, 2024–2026
- 5.17 REGULATORY LANDSCAPE
 - 5.17.1 REGULATORY FRAMEWORK

5.17.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6 AUTOMOTIVE PUMP MARKET, BY TYPE

6.1 INTRODUCTION

6.2 OPERATIONAL DATA

6.3 FUEL PUMPS

6.3.1 ELECTRIFICATION TRENDS DUE TO STRINGENT EMISSION REGULATIONS TO IMPEDE MARKET

6.4 WATER PUMPS

6.4.1 RAPID ADOPTION OF ELECTRIC AND HYBRID VEHICLES TO DRIVE MARKET

6.5 WINDSHIELD WASHER PUMPS

6.5.1 CONSUMER PREFERENCE FOR ENHANCED VEHICLE FEATURES TO DRIVE MARKET

6.6 STEERING PUMPS

6.6.1 INCREASED INSTALLATION OF HYDRAULIC SYSTEMS IN HEAVY COMMERCIAL VEHICLES TO DRIVE MARKET

6.7 OIL TRANSMISSION PUMPS

6.7.1 SHIFT TOWARD AUTOMATED TRANSMISSION TECHNIQUES TO DRIVE MARKET

6.8 FUEL INJECTION PUMPS

6.8.1 ADVANCEMENTS IN ENGINE TECHNOLOGY TO DRIVE MARKET

6.9 VACUUM PUMPS

6.9.1 SURGE IN DEMAND FOR LIGHTWEIGHT VEHICLE COMPONENTS TO DRIVE MARKET

6.10 HEADLIGHT WASHER PUMPS

6.10.1 RISE IN PREMIUM VEHICLE SALES TO DRIVE MARKET

6.11 KEY INDUSTRY INSIGHTS

7 AUTOMOTIVE PUMP MARKET, BY TECHNOLOGY

7.1 INTRODUCTION

7.2 OPERATIONAL DATA

7.3 ELECTRIC PUMPS

7.3.1 COMPLIANCE WITH STRINGENT EMISSION NORMS TO DRIVE MARKET

7.4 MECHANICAL PUMPS

7.4.1 SHIFT TOWARD ELECTRIC PUMPS TO IMPEDE MARKET

7.5 KEY INDUSTRY INSIGHTS

8 AUTOMOTIVE PUMP MARKET, BY DISPLACEMENT

8.1 INTRODUCTION

8.2 OPERATIONAL DATA

8.3 FIXED DISPLACEMENT PUMPS

8.3.1 EXTENSIVE USE IN AUTOMOTIVE APPLICATIONS DUE TO DURABILITY AND COST-EFFECTIVENESS TO DRIVE MARKET

8.4 VARIABLE DISPLACEMENT PUMPS

8.4.1 EMPHASIS ON REDUCING VEHICULAR EMISSIONS TO DRIVE MARKET

8.5 KEY INDUSTRY INSIGHTS

9 AUTOMOTIVE PUMP MARKET, BY APPLICATION

9.1 INTRODUCTION

9.2 OPERATIONAL DATA

9.3 BODY & INTERIOR

9.3.1 INCREASING SALES OF SUVs TO DRIVE MARKET

9.4 ENGINE & HVAC

9.4.1 NEED FOR OPTIMAL ENGINE TEMPERATURES TO DRIVE MARKET

9.5 POWERTRAIN

9.5.1 ADVANCEMENTS IN TRANSMISSION TECHNOLOGIES TO DRIVE MARKET

9.6 KEY INDUSTRY INSIGHTS

10 AUTOMOTIVE PUMP MARKET, BY VEHICLE TYPE

10.1 INTRODUCTION

10.2 OPERATIONAL DATA

10.3 PASSENGER CARS

10.3.1 RISING DEMAND FOR FUEL-EFFICIENT SYSTEMS TO DRIVE MARKET

10.4 LIGHT COMMERCIAL VEHICLES

10.4.1 FOCUS ON REDUCING OPERATIONAL COSTS TO DRIVE MARKET

10.5 BUSES

10.5.1 CONSUMER INCLINATION TOWARD SUSTAINABLE PUBLIC TRANSPORTATION SOLUTIONS TO DRIVE MARKET

10.6 TRUCKS

10.6.1 PUSH FOR ENHANCED FUEL EFFICIENCY AND LOWER EMISSIONS TO DRIVE MARKET

10.7 KEY INDUSTRY INSIGHTS

11 AUTOMOTIVE PUMP MARKET, BY EV TYPE

11.1 INTRODUCTION

11.2 OPERATIONAL DATA

11.3 BATTERY ELECTRIC VEHICLES

11.3.1 HEIGHTENED DEMAND FOR LOW-EMISSION COMMUTING TO DRIVE MARKET

11.4 FUEL CELL ELECTRIC VEHICLES

11.4.1 ADVANCEMENTS IN HYDROGEN FUEL CELL TECHNOLOGY TO DRIVE MARKET

11.5 HYBRID ELECTRIC VEHICLES

11.5.1 FOCUS ON REDUCING ENVIRONMENTAL IMPACT AND FUEL COSTS TO DRIVE MARKET

11.6 PLUG-IN HYBRID VEHICLES

11.6.1 TAX BENEFITS AND GOVERNMENT INCENTIVES TO DRIVE MARKET

11.7 KEY INDUSTRY INSIGHTS

12 AUTOMOTIVE PUMP MARKET, BY OFF-HIGHWAY VEHICLE TYPE

12.1 INTRODUCTION

12.2 OPERATIONAL DATA

12.3 CONSTRUCTION EQUIPMENT

12.4 MINING EQUIPMENT

12.5 KEY INDUSTRY INSIGHTS

13 AUTOMOTIVE PUMP MARKET, BY SALES CHANNEL

13.1 INTRODUCTION

13.2 OEM

13.2.1 INCREASING INVESTMENTS IN PRODUCT R&D TO DRIVE MARKET

13.3 AFTERMARKET

13.3.1 ONGOING TECHNOLOGICAL INNOVATIONS TO DRIVE MARKET

13.4 KEY INDUSTRY INSIGHTS

14 AUTOMOTIVE PUMP MARKET, BY REGION

14.1 INTRODUCTION

14.2 ASIA PACIFIC

14.2.1 MACROECONOMIC OUTLOOK

14.2.2 CHINA

14.2.2.1 High production and sales volume of vehicles to drive market

14.2.3 INDIA

14.2.3.1 Government policies promoting electric vehicles to drive market

14.2.4 JAPAN

14.2.4.1 Significant presence of automotive pump manufacturers

to drive market

14.2.5 SOUTH KOREA

14.2.5.1 Shift toward next-generation technologies to drive market

14.2.6 THAILAND

14.2.6.1 Strong export activities to drive market

14.2.7 REST OF ASIA PACIFIC

14.3 EUROPE

14.3.1 MACROECONOMIC OUTLOOK

14.3.2 FRANCE

14.3.2.1 Extensive use of fuel-efficient vehicles to drive market

14.3.3 GERMANY

14.3.3.1 Early introduction of advanced automotive technologies

to drive market

14.3.4 RUSSIA

14.3.4.1 Construction of new manufacturing facilities to drive market

14.3.5 SPAIN

14.3.5.1 Growing adoption of electric fleets to drive market

14.3.6 TURKEY

14.3.6.1 Rising FDI flow in automotive industry to drive market

14.3.7 UK

14.3.7.1 Surge in domestic production of electric vehicles to drive market

14.3.8 REST OF EUROPE

14.4 NORTH AMERICA

14.4.1 MACROECONOMIC OUTLOOK

14.4.2 CANADA

14.4.2.1 Increasing investments in zero-emission vehicles to drive market

14.4.3 MEXICO

14.4.3.1 Growing production capacity of light and heavy vehicles to drive market

14.4.4 US

14.4.4.1 Government push for adopting fuel-efficient vehicles to drive market

14.5 REST OF THE WORLD

14.5.1 MACROECONOMIC OUTLOOK

14.5.2 BRAZIL

14.5.2.1 Low manufacturing and labor costs to drive market

14.5.3 IRAN

14.5.3.1 Expanding automotive industry to drive market

14.5.4 SOUTH AFRICA

14.5.4.1 Rising demand for emission-free vehicles to drive market

15 COMPETITIVE LANDSCAPE

15.1 INTRODUCTION

15.2 KEY PLAYER STRATEGIES/RIGHT TO WIN, 2021–2024

15.3 MARKET SHARE ANALYSIS, 2023

15.4 REVENUE ANALYSIS, 2019–2023

15.5 COMPANY VALUATION AND FINANCIAL METRICS

15.6 BRAND/PRODUCT COMPARISON

15.7 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023

15.7.1 STARS

15.7.2 EMERGING LEADERS

15.7.3 PERVASIVE PLAYERS

15.7.4 PARTICIPANTS

15.7.5 COMPANY FOOTPRINT

15.7.5.1 Company footprint

15.7.5.2 Application footprint

15.7.5.3 Vehicle type footprint

15.7.5.4 Region footprint

15.8 COMPANY EVALUATION MATRIX: START-UPS/SMES, 2023

15.8.1 PROGRESSIVE COMPANIES

15.8.2 RESPONSIVE COMPANIES

15.8.3 DYNAMIC COMPANIES

15.8.4 STARTING BLOCKS

15.8.5 COMPETITIVE BENCHMARKING

15.8.5.1 List of start-ups/SMEs

15.8.5.2 Competitive benchmarking of start-ups/SMEs

15.9 COMPETITIVE SCENARIO

15.9.1 PRODUCT LAUNCHES/DEVELOPMENTS

15.9.2 DEALS

15.9.3 EXPANSIONS

15.9.4 OTHERS

16 COMPANY PROFILES

16.1 KEY PLAYERS

16.1.1 DENSO CORPORATION

- 16.1.1.1 Business overview
- 16.1.1.2 Products offered
- 16.1.1.3 Recent developments
 - 16.1.1.3.1 Product launches/developments
 - 16.1.1.3.2 Deals
- 16.1.1.4 MnM view
 - 16.1.1.4.1 Key strengths
 - 16.1.1.4.2 Strategic choices
 - 16.1.1.4.3 Weaknesses and competitive threats

16.1.2 AISIN CORPORATION

- 16.1.2.1 Business overview
- 16.1.2.2 Products offered
- 16.1.2.3 Recent developments
 - 16.1.2.3.1 Product launches/developments
 - 16.1.2.3.2 Expansions
- 16.1.2.4 MnM view
 - 16.1.2.4.1 Key strengths
 - 16.1.2.4.2 Strategic choices
 - 16.1.2.4.3 Weaknesses and competitive threats

16.1.3 CONTINENTAL AG

- 16.1.3.1 Business overview
- 16.1.3.2 Products offered
- 16.1.3.3 MnM view
 - 16.1.3.3.1 Key strengths
 - 16.1.3.3.2 Strategic choices
 - 16.1.3.3.3 Weaknesses and competitive threats

16.1.4 ROBERT BOSCH GMBH

- 16.1.4.1 Business overview
- 16.1.4.2 Products offered
- 16.1.4.3 Recent developments
 - 16.1.4.3.1 Deals
 - 16.1.4.3.2 Others
- 16.1.4.4 MnM view
 - 16.1.4.4.1 Key strengths

- 16.1.4.4.2 Strategic choices
- 16.1.4.4.3 Weaknesses and competitive threats
- 16.1.5 MITSUBISHI ELECTRIC CORPORATION
 - 16.1.5.1 Business overview
 - 16.1.5.2 Products offered
 - 16.1.5.3 MnM view
 - 16.1.5.3.1 Key strengths
 - 16.1.5.3.2 Strategic choices
 - 16.1.5.3.3 Weaknesses and competitive threats
- 16.1.6 VALEO
 - 16.1.6.1 Business overview
 - 16.1.6.2 Products offered
 - 16.1.6.3 Recent developments
 - 16.1.6.3.1 Product launches/developments
 - 16.1.6.3.2 Deals
 - 16.1.6.3.3 Others
- 16.1.7 JOHNSON ELECTRIC HOLDINGS LIMITED
 - 16.1.7.1 Business overview
 - 16.1.7.2 Products offered
 - 16.1.7.3 Recent developments
 - 16.1.7.3.1 Others
- 16.1.8 SHW AG
 - 16.1.8.1 Business overview
 - 16.1.8.2 Products offered
 - 16.1.8.3 Recent developments
 - 16.1.8.3.1 Others
- 16.1.9 ZF FRIEDRICHSHAFEN AG
 - 16.1.9.1 Business overview
 - 16.1.9.2 Products offered
 - 16.1.9.3 Recent developments
 - 16.1.9.3.1 Deals
 - 16.1.9.3.2 Expansions
- 16.1.10 HITACHI ASTEMO, LTD.
 - 16.1.10.1 Business overview
 - 16.1.10.2 Products offered
 - 16.1.10.3 Recent developments
 - 16.1.10.3.1 Others
- 16.1.11 RHEINMETALL AG
 - 16.1.11.1 Business overview

- 16.1.11.2 Products offered
- 16.1.11.3 Recent developments
 - 16.1.11.3.1 Product launches/developments
 - 16.1.11.3.2 Deals
 - 16.1.11.3.3 Others
- 16.1.12 MAGNA INTERNATIONAL INC.
 - 16.1.12.1 Business overview
 - 16.1.12.2 Products offered
 - 16.1.12.3 Recent developments
 - 16.1.12.3.1 Others
- 16.2 OTHER PLAYERS
 - 16.2.1 MIKUNI CORPORATION
 - 16.2.2 GMB CORPORATION
 - 16.2.3 PRICOL LIMITED
 - 16.2.4 MAHLE GMBH
 - 16.2.5 MARELLI HOLDINGS CO., LTD.
 - 16.2.6 CUMMINS INC.
 - 16.2.7 INFINEON TECHNOLOGIES AG
 - 16.2.8 HELLA GMBH & CO. KGAA
 - 16.2.9 TI FLUID SYSTEMS
 - 16.2.10 CARTER FUEL SYSTEMS, LLC
 - 16.2.11 BORGWARNER INC.
 - 16.2.12 STANDARD MOTOR PRODUCTS, INC.
 - 16.2.13 EATON
 - 16.2.14 MTQ ENGINE SYSTEMS (AUST) PTY LTD
 - 16.2.15 TRICO CORPORATION
 - 16.2.16 SCHAEFFLER AG
 - 16.2.17 CONCENTRIC AB
 - 16.2.18 JTEKT CORPORATION

17 RECOMMENDATIONS BY MARKETSDANDMARKETS

- 17.1 ASIA PACIFIC TO BE DOMINANT IN AUTOMOTIVE PUMP MARKET DURING FORECAST PERIOD
- 17.2 GROWING ADOPTION OF ELECTRIC PUMPS IN VEHICLES
- 17.3 IMPROVED VEHICLE PERFORMANCE WITH INNOVATIVE FUEL PUMP MODULES
- 17.4 CONCLUSION

18 APPENDIX

18.1 KEY INSIGHTS FROM INDUSTRY EXPERTS

18.2 DISCUSSION GUIDE

18.3 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL

18.4 CUSTOMIZATION OPTIONS

18.4.1 ADDITIONAL COMPANY PROFILES

18.4.2 DETAILED ANALYSIS OF AUTOMOTIVE PUMP MARKET,
BY ELECTRIC COMMERCIAL VEHICLE

18.4.3 DETAILED ANALYSIS OF AUTOMOTIVE PUMP MARKET, BY
DISPLACEMENT

18.4.4 DETAILED ANALYSIS OF AUTOMOTIVE OIL TRANSMISSION AND
STEERING PUMP MARKET

18.5 RELATED REPORTS

18.6 AUTHOR DETAILS

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