

Fluid Transfer System Market by System (Brake, Fuel, AC, Air Suspension, DPF, SCR, Transmission Oil, Turbo Coolant, Engine & Battery Cooling, Air Brake), Material (Al, Rubber, Nylon, Steel, Stainless Steel), On & Off-Highway, EV & Region - Global Forecast to 2027

<https://marketpublishers.com/r/FF553766BDFEN.html>

Date: September 2022

Pages: 302

Price: US\$ 4,950.00 (Single User License)

ID: FF553766BDFEN

Abstracts

The fluid transfer system market is projected to grow from USD 19.1 billion to USD 25.0 billion by 2027, at a CAGR of 5.6% during the forecast period. The growth of the fluid transfer system market is the growing demand for after-treatment devices, turbocharged engines, air suspension in commercial vehicles, and increased electric vehicle sales. The Asia Pacific is projected to lead the fluid transfer system market over the forecast period.

Vehicle production has increased globally. According to OICA, vehicle production reached 80.1 million units in 2021. As the fluid transfer system market is directly dependent on vehicle production, the growing ICE vehicle production would drive the demand for fluid transfer lines for fuel, suspension, AC, brake, transmission, engine cooling, and others. Therefore, the increasing production of vehicles will drive the demand and sales of fluid transfer systems during the forecast period.

“Rubber materials would be the largest fluid transfer system market segment.”

Rubber hoses are commonly used in automotive applications. Rubber hoses can be classified into two types: synthetic rubber and natural rubber. Natural rubber breaks down when exposed to oil, but synthetic rubber has much better chemical resistance, elasticity, and resilience, which makes it a better alternative to natural rubber. These are used for fuel lines, AC lines, Brake lines, turbo coolant hoses, and transmission cooling hoses. Rubber hoses are also increasingly used in engine cooling hoses, mainly the

EPDM rubber, due to their properties such as low electrical conductivity, steam and water resistance, and stability in high and low temperatures. Thus, the low cost of rubber and properties such as hot and cold temperature sustainability and high tear strength is expected to drive the growth of the rubber fluid transfer market.

“Agricultural tractors are predicted to be the largest-growing market for the off-highway vehicles segment.”

Agricultural tractors are predicted to be the largest-growing market for fluid transfer systems during the forecast period. This growth is due to increasing mechanization in the agriculture industry globally, a lack of skilled farm labor, increasing labor cost, and the growing need for operational efficiency and profitability. According to MarketsandMarkets analysis, the global agricultural tractors market demand was valued at nearly 2.8 million units in 2021 and is anticipated to expand at a compound annual growth rate (CAGR) of 6.8% from 2022 to 2030. Also, regional governments' subsidies and other financial support for purchasing farm equipment are boosting the fluid transfer system market for agriculture tractors. The fluid transfer systems used in agricultural tractors are hydraulic lines, brake lines, DPF lines, fuel lines, SCR lines, transmission oil cooling lines, turbo coolant lines, and engine cooling lines. Agricultural tractors will have to deal with reduced emission limits in the upcoming emission regulations and hence the demand for aftreatment devices would rise creating an opportunity for the growth of the fluid transfer lines like DPF and SCR lines in the off-highway vehicles. Thus, considering the abovementioned factors, the agriculture tractor fluid transfer market is expected to grow significantly during the forecast period.

“Europe is anticipated to be the second largest market for fluid transfer systems by 2027.”

According to MarketsandMarkets analysis, Europe is projected to hold the second largest fluid transfer system market by 2027 as the European market is expected to exhibit positive growth in the automotive industry in the coming years, increasing the demand for components such as brake lines, air suspension lines, AC lines, catalytic converters and turbochargers. Europe has stringent emission regulations for on-highway and off-highway vehicles. The European Union implemented the strict Euro 6 emission standards in 2015 which ultimately resulted in shift from diesel engines to gasoline engines in passenger cars. As per ACEA, the diesel car registrations reduced from 36.7% in 2018 to 19.6% in 2021. This resulted in increased GDI and turbocharged engines. Due to this there is increased demand for turbo lines and improvised engine/transmission cooling lines. Similarly, the reducing emission limits for off-highway

vehicles has propelled the demand for advanced and efficient after treatment devices like DPF and SCR which increased the demand for fluid transfer lines such as the DPF and SCR lines. Also, increasing penetration of automatic transmission over manual transmission is expected to drive the transmission oil cooling lines market in the coming years. Thus, this would create an opportunity for the growth of the fluid transfer system market in Europe during the forecast period.

In-depth interviews were conducted with CXOs, VPs, directors from business development, marketing, product development/innovation teams, independent consultants, and executives from various key organizations operating in this market.

By Stakeholder: Supply Side - 55%, Demand Side- 45%

By Designation: C level executives - 10%, Directors/Vice-Presidents - 30%, Others – 60%

By Region: Asia Oceania - 50%, Europe - 30%, and North America - 20%

The construction equipment market comprises prominent players such as Cooper Standard (US), Kongsberg Automotive (Switzerland), Continental AG (Germany), Akwel (France), TI Fluid Systems (UK) and Gates Corporation (US).

Research Coverage:

The study segments the fluid transfer system market and forecasts the market size based on system (air suspension lines, fuel lines, AC lines, brake lines, DPF lines, SCR lines, transmission oil cooling lines, turbo coolant lines, air brake lines, engine cooling lines and battery cooling lines), material (nylon, steel, stainless steel, aluminum, rubber, other materials), type (hose and tubing), on-highway vehicles (passenger cars, light commercial vehicles, trucks, and buses), electric & hybrid vehicles (battery electric vehicles, hybrid electric vehicles, plug-in hybrid electric vehicles), off-highway vehicles (construction equipment, mining equipment, and agricultural tractors), and region (North America, Europe, Asia Pacific, and Rest of the World).

The study also includes an in-depth competitive analysis of the market's key players, 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 the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall fluid transfer system market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INDUSTRY-SPECIFIC DEFINITIONS

1.4 INCLUSIONS AND EXCLUSIONS

1.5 STUDY SCOPE

1.5.1 MARKETS COVERED

FIGURE 1 FLUID TRANSFER SYSTEM MARKET SEGMENTATION

1.5.2 YEARS CONSIDERED

1.6 CURRENCY CONSIDERED

1.7 STAKEHOLDERS

1.8 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH DESIGN

FIGURE 3 RESEARCH METHODOLOGY MODEL

2.1.1 SECONDARY DATA

2.1.1.1 List of key secondary sources

2.1.1.2 Key data from secondary sources

2.1.2 PRIMARY DATA

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS: BY STAKEHOLDER, DESIGNATION, AND REGION

2.1.2.1 Sampling techniques and data collection methods

2.1.2.2 List of primary participants

2.2 MARKET ESTIMATION METHODOLOGY

2.2.1 BOTTOM-UP APPROACH

FIGURE 5 FLUID TRANSFER SYSTEM MARKET SIZE: BOTTOM-UP APPROACH (SYSTEM, VEHICLE TYPE, AND REGION)

FIGURE 6 FLUID TRANSFER SYSTEM MARKET SIZE: BOTTOM-UP APPROACH (OFF-HIGHWAY VEHICLE)

FIGURE 7 FLUID TRANSFER SYSTEM MARKET SIZE: BOTTOM-UP APPROACH (ELECTRIC AND HYBRID VEHICLE)

2.2.2 TOP-DOWN APPROACH

FIGURE 8 FLUID TRANSFER SYSTEM MARKET SIZE: TOP-DOWN APPROACH (BY

TYPE)

2.3 DATA TRIANGULATION

FIGURE 9 DATA TRIANGULATION METHODOLOGY

2.4 RESEARCH ASSUMPTIONS

2.4.1 GLOBAL ASSUMPTIONS

2.4.2 MARKET ASSUMPTIONS

2.5 LIMITATIONS

3 EXECUTIVE SUMMARY

3.1 REPORT SUMMARY

FIGURE 10 FLUID TRANSFER SYSTEM: MARKET OUTLOOK

FIGURE 11 FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022 VS. 2027 (USD MILLION)

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR KEY MARKET PLAYERS IN FLUID TRANSFER SYSTEM MARKET

FIGURE 12 STRINGENT EMISSION NORMS TO DRIVE FLUID TRANSFER MARKET

4.2 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM

FIGURE 13 AC LINES SEGMENT EXPECTED TO LEAD FLUID TRANSFER SYSTEM MARKET, 2022 VS. 2027 (USD MILLION)

4.3 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL

FIGURE 14 RUBBER SEGMENT EXPECTED TO HOLD LARGEST MARKET SHARE, 2022 VS. 2027 (USD THOUSAND)

4.4 FLUID TRANSFER SYSTEM MARKET, BY TYPE

FIGURE 15 HOSES EXPECTED TO LEAD FLUID TRANSFER SYSTEM MARKET DURING FORECAST PERIOD

4.5 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE

FIGURE 16 PASSENGER CARS SEGMENT EXPECTED TO DOMINATE FLUID TRANSFER SYSTEM MARKET FROM 2022 TO 2027

4.6 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE

FIGURE 17 BEVS EXPECTED TO HOLD LARGEST SHARE IN FLUID TRANSFER SYSTEM MARKET IN 2022

4.7 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE

FIGURE 18 AGRICULTURAL TRACTORS EXPECTED TO LEAD FLUID TRANSFER SYSTEM MARKET FROM 2022–2027

4.8 FLUID TRANSFER SYSTEM MARKET, BY REGION

FIGURE 19 ASIA PACIFIC EXPECTED TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 20 FLUID TRANSFER SYSTEM MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Growing stringency in tailpipe emission limits

5.2.1.1.1 Updated engine technologies and engine downsizing

5.2.1.1.2 Stringent emission norms to mandate after-treatment devices

TABLE 1 ON-HIGHWAY VEHICLE EMISSION LIMITS: OVERVIEW

FIGURE 21 OFF-HIGHWAY (NON-ROAD MOBILE MACHINERY) VEHICLE EMISSION REGULATIONS – AN OVERVIEW

FIGURE 22 AFTER-TREATMENT DEVICE MARKET SIZE, SCR VS. DPF LINES, 2022–2026 (USD BILLION)

5.2.1.2 Increasing vehicle production

FIGURE 23 GLOBAL VEHICLE PRODUCTION, 2021–2027 (THOUSAND UNITS)

5.2.2 RESTRAINTS

5.2.2.1 Rising popularity of electric vehicles may impact market for ICE vehicles

5.2.3 OPPORTUNITIES

5.2.3.1 Growing vehicle electrification/alternate fuel vehicles to create new revenue pockets

FIGURE 24 ELECTRIC PASSENGER CAR SALES, 2022–2030 (THOUSAND UNITS)

5.2.3.2 Surging demand for lightweight vehicle parts

TABLE 2 WEIGHT REDUCTION GOALS FOR LIGHT DUTY VEHICLES, 2020 VS. 2050

TABLE 3 FUTURE WEIGHT REDUCTION TARGETS, BY COMPONENT, 2025 VS. 2050

5.2.4 CHALLENGES

5.2.4.1 Demand for high-durability products

5.3 PORTER'S FIVE FORCES ANALYSIS

TABLE 4 PORTER'S FIVE FORCES ANALYSIS

FIGURE 25 PORTER'S FIVE FORCES

5.3.1 THREAT OF NEW ENTRANTS

5.3.2 THREAT OF SUBSTITUTES

5.3.3 BARGAINING POWER OF SUPPLIERS

5.3.4 BARGAINING POWER OF BUYERS

5.3.5 INTENSITY OF COMPETITIVE RIVALRY

5.4 SCENARIOS – FLUID TRANSFER SYSTEM MARKET

FIGURE 26 FLUID TRANSFER SYSTEM MARKET SCENARIO, 2019–2027 (USD MILLION)

5.4.1 REALISTIC SCENARIO

TABLE 5 FLUID TRANSFER SYSTEM MARKET (REALISTIC SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.4.2 PESSIMISTIC SCENARIO

TABLE 6 FLUID TRANSFER SYSTEM MARKET (PESSIMISTIC IMPACT SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.4.3 OPTIMISTIC SCENARIO

TABLE 7 FLUID TRANSFER SYSTEM MARKET (OPTIMISTIC SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.5 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

FIGURE 27 REVENUE SHIFT DRIVING MARKET GROWTH

5.6 ECOSYSTEM

5.6.1 ECOSYSTEM: FLUID TRANSFER SYSTEM MARKET

FIGURE 28 FLUID TRANSFER SYSTEM MARKET: ECOSYSTEM

TABLE 8 FLUID TRANSFER SYSTEM MARKET: ECOSYSTEM

FIGURE 29 KEY PLAYERS IN FLUID TRANSFER SYSTEM MARKET ECOSYSTEM

5.7 SUPPLY CHAIN ANALYSIS

5.7.1 SUPPLY CHAIN ANALYSIS: FLUID TRANSFER SYSTEM MARKET

5.8 TECHNOLOGY ANALYSIS

5.8.1 OVERVIEW

5.8.1.1 Gates introduced new and innovative hydraulic hose for fluid power applications

5.8.1.2 TI Fluid Systems supplies Volkswagen ID.3 and ID.4 battery electric vehicles with industry-first thermal technology

5.9 AVERAGE PRICING ANALYSIS

5.9.1 BY SYSTEM AND REGION

TABLE 9 AVERAGE PRICES OF FLUID TRANSFER SYSTEM EQUIPMENT TYPES, BY REGION, 2019–2021

5.10 PATENT ANALYSIS

5.11 TRADE ANALYSIS

5.11.1 EXPORT SCENARIO

TABLE 10 FLUID TRANSFER SYSTEM MARKET EXPORT SCENARIO (PARTS), BY COUNTRY, 2017–2021 (USD MILLION)

5.11.2 IMPORT SCENARIO

TABLE 11 FLUID TRANSFER SYSTEM MARKET IMPORT SCENARIO (PARTS), BY COUNTRY, 2017–2021 (USD MILLION)

5.12 REGULATORY LANDSCAPE

5.12.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 12 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 13 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 14 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 15 ROW: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.12.2 REGULATORY ANALYSIS FOR FLUID TRANSFER SYSTEM MARKET

5.12.2.1 US

5.12.2.2 China

5.12.2.3 Japan

5.12.2.4 India

5.12.2.5 South Korea

5.12.2.6 Brazil

5.12.2.7 Europe

TABLE 16 EURO-5 VS. EURO-6 VEHICLE EMISSION STANDARDS ON NEW EUROPEAN DRIVING CYCLE

5.13 CASE STUDY ANALYSIS

5.13.1 USE CASE 1: LUCAS MILHAUPT DEVELOPED SOLUTION TO ELIMINATE LEAKS IN FLUID TRANSFER SYSTEMS FOR FORD MOTOR COMPANY

5.13.2 USE CASE 2: AUTOMOTIVE COMPANIES TO REDUCE WEIGHT OF FLUID TRANSFER SYSTEM COMPONENTS

5.14 KEY CONFERENCES AND EVENTS, 2022–2023

TABLE 17 FLUID TRANSFER SYSTEM MARKET: DETAILED LIST OF CONFERENCES AND EVENTS

5.15 BUYING CRITERIA

FIGURE 30 KEY BUYING CRITERIA FOR DIFFERENT VEHICLE APPLICATIONS

TABLE 18 KEY BUYING CRITERIA FOR DIFFERENT VEHICLE APPLICATIONS

6 RECOMMENDATIONS BY MARKETSDANDMARKETS

6.1 ASIA PACIFIC IS POTENTIAL MARKET FOR FLUID TRANSFER SYSTEMS

6.2 COMPANIES TO INCREASE FOCUS ON LIGHTWEIGHT YET HIGHLY

EFFECTIVE MATERIALS

6.3 GROWING DEMAND FOR ELECTRIC VEHICLES DRIVING FLUID TRANSFER SYSTEM MARKET

6.4 CONCLUSION

7 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM

7.1 INTRODUCTION

7.1.1 RESEARCH METHODOLOGY

7.1.2 ASSUMPTIONS

7.1.3 INDUSTRY INSIGHTS

FIGURE 31 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022 VS. 2027 (USD MILLION)

TABLE 19 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 20 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 21 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 22 FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

7.2 AIR SUSPENSION LINES

7.2.1 HIGH CHEMICAL AND HEAT RESISTANCE EXPECTED TO DRIVE SEGMENT

TABLE 23 AIR SUSPENSION LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 24 AIR SUSPENSION LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 25 AIR SUSPENSION LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 26 AIR SUSPENSION LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3 FUEL LINES

7.3.1 DEVELOPMENTS IN NYLON MATERIAL EXPECTED TO FOSTER DEMAND

TABLE 27 FUEL LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 28 FUEL LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 29 FUEL LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 30 FUEL LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.4 BRAKE LINES

7.4.1 GROWING PENETRATION OF EBS TO DRIVE SEGMENT GROWTH

TABLE 31 BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 32 BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 33 BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 34 BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.5 AC LINES

7.5.1 INCREASING DEMAND FOR REAR AIR CONDITIONING

TABLE 35 AC LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 36 AC LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 37 AC LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 38 AC LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.6 DIESEL PARTICULATE FILTER (DPF) LINES

7.6.1 IMPLEMENTATION OF STRINGENT EMISSION STANDARDS TO DRIVE DPF MARKET

TABLE 39 DPF LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 40 DPF LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 41 DPF LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 42 DPF LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.7 SELECTIVE CATALYTIC REDUCTION (SCR) LINES

7.7.1 OEMS INCREASINGLY ADOPTING ADVANCED TECHNOLOGIES FOR EMISSION CONTROL DRIVING DEMAND FOR SCR

TABLE 43 SCR LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 44 SCR LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION,

2022–2027 ('000 UNITS)

TABLE 45 SCR LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 46 SCR LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.8 TRANSMISSION OIL COOLING LINES

7.8.1 INCREASING ADOPTION OF AUTOMATIC TRANSMISSION

TABLE 47 TRANSMISSION OIL COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 48 TRANSMISSION OIL COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 49 TRANSMISSION OIL COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 50 TRANSMISSION OIL COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.9 TURBO COOLANT LINES

7.9.1 RISING ADOPTION OF TURBOCHARGERS IN PASSENGER CARS

TABLE 51 TURBO COOLANT LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 52 TURBO COOLANT LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 53 TURBO COOLANT LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 54 TURBO COOLANT LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.10 ENGINE COOLING LINES

7.10.1 DEMAND FOR ENHANCED SAFETY EXPECTED TO DRIVE SEGMENT

TABLE 55 ENGINE COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 56 ENGINE COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 57 ENGINE COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 58 ENGINE COOLING LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

7.11 AIR BRAKE LINES

7.11.1 ENHANCED SAFETY AND RELIABILITY TO DRIVE DEMAND

TABLE 59 AIR BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 60 AIR BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 61 AIR BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 62 AIR BRAKE LINES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

8 FLUID TRANSFER SYSTEM MARKET, BY TYPE

8.1 INTRODUCTION

8.1.1 RESEARCH METHODOLOGY

8.1.2 ASSUMPTIONS

8.1.3 INDUSTRY INSIGHTS

FIGURE 32 FLUID TRANSFER SYSTEM MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 63 FLUID TRANSFER SYSTEM MARKET, BY TYPE, 2018–2021 ('000 UNITS)

TABLE 64 FLUID TRANSFER SYSTEM MARKET, BY TYPE, 2022–2027 ('000 UNITS)

TABLE 65 FLUID TRANSFER SYSTEM MARKET, BY TYPE, 2018–2021 (USD MILLION)

TABLE 66 FLUID TRANSFER SYSTEM MARKET, BY TYPE, 2022–2027 (USD MILLION)

8.2 HOSES

8.2.1 FLEXIBILITY, RESILIENCY, AND WEATHERABILITY DRIVING SEGMENT

TABLE 67 HOSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 68 HOSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 69 HOSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 70 HOSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

8.3 TUBING

8.3.1 INCREASING USAGE OF TURBO COOLANT LINES AND SCR LINES

TABLE 71 TUBING: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 72 TUBING: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 73 TUBING: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 74 TUBING: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(USD MILLION)

9 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL

9.1 INTRODUCTION

9.1.1 RESEARCH METHODOLOGY

9.1.2 ASSUMPTIONS

9.1.3 INDUSTRY INSIGHTS

FIGURE 33 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL, 2022 VS. 2027
(USD THOUSAND)

TABLE 75 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL, 2018–2021 (TONS)

TABLE 76 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL, 2022–2027 (TONS)

TABLE 77 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL, 2018–2021 (USD
THOUSAND)

TABLE 78 FLUID TRANSFER SYSTEM MARKET, BY MATERIAL, 2022–2027 (USD
THOUSAND)

9.2 NYLON

9.2.1 CORROSION RESISTANCE AND GROWING POPULARITY OF AIR BRAKE
LINES TO INCREASE NYLON USAGE

TABLE 79 NYLON: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(TONS)

TABLE 80 NYLON: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(TONS)

TABLE 81 NYLON: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(USD THOUSAND)

TABLE 82 NYLON: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(USD THOUSAND)

9.3 STAINLESS STEEL

9.3.1 LIGHTWEIGHT TREND EXPECTED TO DRIVE USE OF STAINLESS STEEL

TABLE 83 STAINLESS STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION,
2018–2021 (TONS)

TABLE 84 STAINLESS STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION,
2022–2027 (TONS)

TABLE 85 STAINLESS STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION,
2018–2021 (USD THOUSAND)

TABLE 86 STAINLESS STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION,
2022–2027 (USD THOUSAND)

9.4 ALUMINUM

9.4.1 GROWING ADOPTION OF ALUMINUM REAR AC SYSTEMS

TABLE 87 ALUMINUM: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (TONS)

TABLE 88 ALUMINUM: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (TONS)

TABLE 89 ALUMINUM: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD THOUSAND)

TABLE 90 ALUMINUM: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD THOUSAND)

9.5 STEEL

9.5.1 EASY AVAILABILITY AND LOW COST OF STEEL DRIVING DEMAND

TABLE 91 STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (TONS)

TABLE 92 STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (TONS)

TABLE 93 STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD THOUSAND)

TABLE 94 STEEL: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD THOUSAND)

9.6 RUBBER

9.6.1 LOW PRICE WITH TEMPERATURE SUSTAINABILITY LIKELY TO FUEL MARKET

TABLE 95 RUBBER: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (TONS)

TABLE 96 RUBBER: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (TONS)

TABLE 97 RUBBER: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD THOUSAND)

TABLE 98 RUBBER: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD THOUSAND)

9.7 OTHERS

9.7.1 DESIGN FLEXIBILITY AND DURABILITY EXPECTED TO DRIVE USE OF OTHER MATERIALS

TABLE 99 OTHERS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (TONS)

TABLE 100 OTHERS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (TONS)

TABLE 101 OTHERS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD THOUSAND)

TABLE 102 OTHERS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD THOUSAND)

10 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE

10.1 INTRODUCTION

10.1.1 RESEARCH METHODOLOGY

10.1.2 ASSUMPTIONS

10.1.3 INDUSTRY INSIGHTS

FIGURE 34 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 103 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE, 2018–2021 ('000 UNITS)

TABLE 104 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE TYPE, 2022–2027 ('000 UNITS)

TABLE 105 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 106 FLUID TRANSFER SYSTEM MARKET, BY ON-HIGHWAY VEHICLE TYPE, 2022–2027 (USD MILLION)

10.2 PASSENGER CARS

10.2.1 INCREASING ADOPTION OF TGDI EXPECTED TO DRIVE SEGMENT

TABLE 107 PASSENGER CARS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 108 PASSENGER CARS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 109 PASSENGER CARS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 110 PASSENGER CARS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

10.3 LIGHT COMMERCIAL VEHICLES (LCVS)

10.3.1 ADOPTION OF AUTOMATIC TRANSMISSION AND TURBOCHARGERS TO DRIVE MARKET

TABLE 111 LCVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 112 LCVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 113 LCVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 114 LCVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027

(USD MILLION)

10.4 TRUCKS

10.4.1 GOVERNMENT REGULATIONS FOR EMISSION CONTROL TO DRIVE USE OF AC LINES IN TRUCKS

TABLE 115 TRUCKS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 116 TRUCKS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 117 TRUCKS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 118 TRUCKS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

10.5 BUSES

10.5.1 INCREASING ADOPTION OF AIR BRAKE SYSTEMS IN BUSES

TABLE 119 BUSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 120 BUSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 121 BUSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 122 BUSES: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

11 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE

11.1 INTRODUCTION

11.1.1 RESEARCH METHODOLOGY

11.1.2 ASSUMPTIONS

11.1.3 INDUSTRY INSIGHTS

FIGURE 35 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE, 2022 VS. 2027 (USD MILLION)

TABLE 123 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE, 2018–2021 ('000 UNITS)

TABLE 124 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE, 2022–2027 ('000 UNITS)

TABLE 125 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE, 2018–2021 (USD MILLION)

TABLE 126 FLUID TRANSFER SYSTEM MARKET, BY ELECTRIC & HYBRID VEHICLE, 2022–2027 (USD MILLION)

11.2 BATTERY ELECTRIC VEHICLES (BEVS)

11.2.1 STRINGENCY IN EMISSION LIMITS LEADING TO GROWTH IN BEV SALES

TABLE 127 BEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(‘000 UNITS)

TABLE 128 BEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(‘000 UNITS)

TABLE 129 BEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(USD MILLION)

TABLE 130 BEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(USD MILLION)

11.3 PLUG-IN HYBRID ELECTRIC VEHICLES (PHEVS)

11.3.1 VARIOUS PHEV MODEL LAUNCHES EXPECTED TO DRIVE MARKET

TABLE 131 PHEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(‘000 UNITS)

TABLE 132 PHEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(‘000 UNITS)

TABLE 133 PHEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(USD MILLION)

TABLE 134 PHEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(USD MILLION)

11.4 FUEL CELL ELECTRIC VEHICLES (FCEVS)

11.4.1 INVESTMENTS BY GOVERNMENTS AND PRIVATE COMPANIES TO
PROMOTE FUEL CELL TECHNOLOGY

TABLE 135 FCEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(‘000 UNITS)

TABLE 136 FCEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(‘000 UNITS)

TABLE 137 FCEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021
(USD MILLION)

TABLE 138 FCEVS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027
(USD MILLION)

12 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE

12.1 INTRODUCTION

12.1.1 RESEARCH METHODOLOGY

12.1.2 ASSUMPTIONS

12.1.3 INDUSTRY INSIGHTS

FIGURE 36 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE,

Fluid Transfer System Market by System (Brake, Fuel, AC, Air Suspension, DPF, SCR, Transmission Oil, Turbo Coo...

2022 VS. 2027 (USD MILLION)

TABLE 139 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE, 2018–2021 ('000 UNITS)

TABLE 140 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE, 2022–2027 ('000 UNITS)

TABLE 141 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE, 2018–2021 (USD MILLION)

TABLE 142 FLUID TRANSFER SYSTEM MARKET, BY OFF-HIGHWAY VEHICLE, 2022–2027 (USD MILLION)

12.2 AGRICULTURAL TRACTORS

12.2.1 SUBSIDIES/LOAN WAIVERS BOOSTING TRACTOR SALES

TABLE 143 AGRICULTURAL TRACTORS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 144 AGRICULTURAL TRACTORS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 145 AGRICULTURAL TRACTORS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 146 AGRICULTURAL TRACTORS: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

12.3 CONSTRUCTION EQUIPMENT

12.3.1 GROWING INDUSTRIALIZATION AND CONSTRUCTION ACTIVITIES EXPECTED TO DRIVE DEMAND

TABLE 147 CONSTRUCTION EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 148 CONSTRUCTION EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 149 CONSTRUCTION EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 150 CONSTRUCTION EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

12.4 MINING EQUIPMENT

12.4.1 INCREASING MINING ACTIVITIES EXPECTED TO DRIVE DEMAND

TABLE 151 MINING EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 152 MINING EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 153 MINING EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 154 MINING EQUIPMENT: FLUID TRANSFER SYSTEM MARKET, BY

REGION, 2022–2027 (USD MILLION)

13 FLUID TRANSFER SYSTEM MARKET, BY REGION

13.1 INTRODUCTION

13.1.1 RESEARCH METHODOLOGY

13.1.2 ASSUMPTIONS

13.1.3 INDUSTRY INSIGHTS

FIGURE 37 FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022 VS. 2027 (USD MILLION)

TABLE 155 FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 156 FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 157 FLUID TRANSFER SYSTEM MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 158 FLUID TRANSFER SYSTEM MARKET, BY REGION, 2022–2027 (USD MILLION)

13.2 ASIA PACIFIC

FIGURE 38 ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET SNAPSHOT

TABLE 159 ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 160 ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 161 ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 162 ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.2.1 CHINA

13.2.1.1 Growing popularity of TGDI expected to drive market

TABLE 163 CHINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 164 CHINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 165 CHINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 166 CHINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.2.2 INDIA

13.2.2.1 Stringent emission standards and growing BEV sales

TABLE 167 INDIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 168 INDIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 169 INDIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 170 INDIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.2.3 JAPAN

13.2.3.1 Popularity of automatic transmission to drive market

TABLE 171 JAPAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 172 JAPAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 173 JAPAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 174 JAPAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.2.4 SOUTH KOREA

13.2.4.1 Increasing gasoline models projected to drive market

TABLE 175 SOUTH KOREA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 176 SOUTH KOREA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 177 SOUTH KOREA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 178 SOUTH KOREA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.2.5 THAILAND

13.2.5.1 Stringent emission norms leading to fuel-efficient vehicles

TABLE 179 THAILAND: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 180 THAILAND: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 181 THAILAND: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 182 THAILAND: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.2.6 REST OF ASIA PACIFIC

TABLE 183 REST OF ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 184 REST OF ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 185 REST OF ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 186 REST OF ASIA PACIFIC: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3 EUROPE

FIGURE 39 EUROPE: FLUID TRANSFER SYSTEM MARKET SNAPSHOT, 2022 VS. 2027 (USD MILLION)

TABLE 187 EUROPE: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 188 EUROPE: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 189 EUROPE: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 190 EUROPE: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.3.1 GERMANY

13.3.1.1 Decline in diesel vehicles expected to impact market

TABLE 191 GERMANY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 192 GERMANY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 193 GERMANY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 194 GERMANY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3.2 FRANCE

13.3.2.1 Increasing adoption of rear AC lines

TABLE 195 FRANCE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 196 FRANCE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 197 FRANCE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 198 FRANCE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM,

2022–2027 (USD MILLION)

13.3.3 RUSSIA

13.3.3.1 Growing popularity of premium vehicles

TABLE 199 RUSSIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 200 RUSSIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 201 RUSSIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 202 RUSSIA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3.4 SPAIN

13.3.4.1 Recent implementation of Euro 6 norms

TABLE 203 SPAIN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 204 SPAIN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 205 SPAIN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 206 SPAIN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3.5 UK

13.3.5.1 Increased sales of gasoline vehicles

TABLE 207 UK: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 208 UK: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 209 UK: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 210 UK: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3.6 TURKEY

13.3.6.1 Growing penetration of foreign luxury automakers

TABLE 211 TURKEY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 212 TURKEY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 213 TURKEY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 214 TURKEY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3.7 ITALY

13.3.7.1 Preference for premium passenger cars

TABLE 215 ITALY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 216 ITALY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 217 ITALY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 218 ITALY: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.3.8 REST OF EUROPE

TABLE 219 REST OF EUROPE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 220 REST OF EUROPE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 221 REST OF EUROPE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 222 REST OF EUROPE: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.4 NORTH AMERICA

FIGURE 40 NORTH AMERICA: FLUID TRANSFER SYSTEM MARKET SNAPSHOT

TABLE 223 NORTH AMERICA: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 224 NORTH AMERICA: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 225 NORTH AMERICA: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 226 NORTH AMERICA: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.4.1 CANADA

13.4.1.1 Emission standards for large gasoline vehicles

TABLE 227 CANADA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 228 CANADA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 229 CANADA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 230 CANADA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.4.2 MEXICO

13.4.2.1 Free trade agreements with US to drive market

TABLE 231 MEXICO: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 232 MEXICO: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 233 MEXICO: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 234 MEXICO: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.4.3 US

13.4.3.1 Adoption of after-treatment devices in LCVs

TABLE 235 US: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 236 US: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 237 US: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 238 US: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.5 REST OF THE WORLD (ROW)

FIGURE 41 ROW: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022 VS. 2027 (USD MILLION)

TABLE 239 REST OF THE WORLD: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 240 REST OF THE WORLD: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 241 REST OF THE WORLD: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 242 REST OF THE WORLD: FLUID TRANSFER SYSTEM MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

13.5.1 BRAZIL

13.5.1.1 Trade agreements with US and Canada to propel market growth

TABLE 243 BRAZIL: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 244 BRAZIL: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 245 BRAZIL: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 246 BRAZIL: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.5.2 IRAN

13.5.2.1 Government efforts to promote cleaner fuel vehicles

TABLE 247 IRAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 248 IRAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 249 IRAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 250 IRAN: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.5.3 SOUTH AFRICA

13.5.3.1 Launch of premium vehicles projected to drive market

TABLE 251 SOUTH AFRICA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 252 SOUTH AFRICA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 253 SOUTH AFRICA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 254 SOUTH AFRICA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.5.4 ARGENTINA

13.5.4.1 Government to promote investments in automotive sector

TABLE 255 ARGENTINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 256 ARGENTINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 257 ARGENTINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 258 ARGENTINA: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

13.5.5 REST OF ROW

TABLE 259 REST OF ROW: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 ('000 UNITS)

TABLE 260 REST OF ROW: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 ('000 UNITS)

TABLE 261 REST OF ROW: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2018–2021 (USD MILLION)

TABLE 262 REST OF ROW: FLUID TRANSFER SYSTEM MARKET, BY SYSTEM, 2022–2027 (USD MILLION)

14 COMPETITIVE LANDSCAPE

14.1 OVERVIEW

14.2 FLUID TRANSFER SYSTEM MARKET SHARE ANALYSIS, 2021

FIGURE 42 FLUID TRANSFER SYSTEM MARKET SHARE, 2021

14.3 REVENUE ANALYSIS OF TOP PLAYERS

FIGURE 43 REVENUE ANALYSIS IN FLUID TRANSFER SYSTEM MARKET

14.4 COMPETITIVE EVALUATION QUADRANT

14.4.1 TERMINOLOGY

14.4.2 STARS

14.4.3 PERVASIVE PLAYERS

14.4.4 EMERGING LEADERS

14.4.5 PARTICIPANTS

FIGURE 44 FLUID TRANSFER SYSTEM MANUFACTURERS: COMPETITIVE EVALUATION MATRIX FOR KEY PLAYERS, 2021

14.5 FLUID TRANSFER SYSTEM MARKET: COMPANY FOOTPRINT

TABLE 263 FLUID TRANSFER SYSTEM MARKET: COMPANY FOOTPRINT, 2021

TABLE 264 FLUID TRANSFER SYSTEM MARKET: BY TYPE FOOTPRINT, 2021

TABLE 265 FLUID TRANSFER SYSTEM MARKET: BY REGION FOOTPRINT, 2021

14.6 COMPETITIVE BENCHMARKING

TABLE 266 FLUID TRANSFER SYSTEM MARKET: DETAILED LIST OF KEY SMES

TABLE 267 FLUID TRANSFER SYSTEM MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS [SMES]

14.7 COMPETITIVE SCENARIO

14.7.1 PRODUCT LAUNCHES

TABLE 268 PRODUCT LAUNCHES, 2019-2022

14.7.2 DEALS

TABLE 269 DEALS, 2019–2022

14.7.3 EXPANSIONS, 2019–2022

TABLE 270 EXPANSIONS, 2019–2022

14.8 KEY PLAYER STRATEGIES/RIGHT TO WIN

TABLE 271 OVERVIEW OF STRATEGIES DEPLOYED BY KEY FLUID TRANSFER SYSTEM OEMS

15 COMPANY PROFILES

(Business Overview, Products Offered, Recent Developments, MnM View Right to win, Strategic choices made, Weaknesses and competitive threats) *

15.1 KEY PLAYERS

15.1.1 COOPER STANDARD

TABLE 272 COOPER STANDARD: BUSINESS OVERVIEW

FIGURE 45 COOPER STANDARD: COMPANY SNAPSHOT

TABLE 273 COOPER STANDARD: PRODUCTS OFFERED

TABLE 274 COOPER STANDARD: DEALS

15.1.2 KONGSBERG AUTOMOTIVE

TABLE 275 KONGSBERG AUTOMOTIVE: BUSINESS OVERVIEW

FIGURE 46 KONGSBERG AUTOMOTIVE: COMPANY SNAPSHOT

TABLE 276 KONGSBERG AUTOMOTIVE: PRODUCT LAUNCHES

TABLE 277 KONGSBERG AUTOMOTIVE: DEALS

TABLE 278 KONGSBERG AUTOMOTIVE: OTHERS

15.1.3 CONTINENTAL AG

TABLE 279 CONTINENTAL AG: BUSINESS OVERVIEW

FIGURE 47 CONTINENTAL AG: COMPANY SNAPSHOT

TABLE 280 CONTINENTAL AG: DEALS

TABLE 281 CONTINENTAL AG: OTHERS

15.1.4 AKWEL

TABLE 282 AKWEL: BUSINESS OVERVIEW

FIGURE 48 AKWEL: COMPANY SNAPSHOT

TABLE 283 AKWEL: DEALS

TABLE 284 AKWEL: OTHERS

15.1.5 TI FLUID SYSTEMS

TABLE 285 TI FLUID SYSTEMS: BUSINESS OVERVIEW

FIGURE 49 TI FLUID SYSTEMS: COMPANY SNAPSHOT

TABLE 286 TI FLUID SYSTEMS: PRODUCT LAUNCHES

TABLE 287 TI FLUID SYSTEMS: DEALS

TABLE 288 TI FLUID SYSTEMS: OTHERS

15.1.6 GATES CORPORATION

TABLE 289 GATES CORPORATION: BUSINESS OVERVIEW

FIGURE 50 GATES CORPORATION: COMPANY SNAPSHOT

TABLE 290 GATES CORPORATION: PRODUCT LAUNCHES

15.1.7 LANDER TUBULAR PRODUCTS

TABLE 291 LANDER TUBULAR PRODUCTS: BUSINESS OVERVIEW

TABLE 292 LANDER TUBULAR PRODUCTS: DEALS

15.1.8 HUTCHINSON

TABLE 293 HUTCHINSON: BUSINESS OVERVIEW

TABLE 294 HUTCHINSON: DEALS

15.1.9 TRISTONE

TABLE 295 TRISTONE: BUSINESS OVERVIEW

TABLE 296 TRISTONE: DEALS

TABLE 297 TRISTONE: OTHERS

15.1.10 CASTELLO ITALIA

TABLE 298 CASTELLO ITALIA: BUSINESS OVERVIEW

TABLE 299 CASTELLO ITALIA: DEALS

15.2 OTHER PLAYERS

15.2.1 PIRTEK FLUID TRANSFER SOLUTIONS

TABLE 300 PIRTEK FLUID TRANSFER SOLUTIONS: COMPANY OVERVIEW

15.2.2 AGS AUTOMOTIVE SOLUTIONS

TABLE 301 AGS AUTOMOTIVE SOLUTIONS: COMPANY OVERVIEW

15.2.3 GRACO INC.

TABLE 302 GRACO INC.: COMPANY OVERVIEW

15.2.4 BALCRANK CORPORATION, INC.

TABLE 303 BALCRANK CORPORATION, INC.: COMPANY OVERVIEW

15.2.5 REELCRAFT INDUSTRIES

TABLE 304 REELCRAFT INDUSTRIES: COMPANY OVERVIEW

15.2.6 SANOH INDUSTRIAL CO., LTD.

TABLE 305 SANOH INDUSTRIAL CO., LTD.: COMPANY OVERVIEW

15.2.7 MACNAUGHT PTY LTD

TABLE 306 MACNAUGHT PTY LTD: COMPANY OVERVIEW

15.2.8 CALEX AUTO PVT. LTD.

TABLE 307 CALEX AUTO PVT. LTD.: COMPANY OVERVIEW

15.2.9 DELFINGEN

TABLE 308 DELFINGEN: COMPANY OVERVIEW

15.2.10 KROS OTOMOTIV SANAYI VE TIC A.S.

TABLE 309 KROS OTOMOTIV SANAYI VE TIC A.S.: COMPANY OVERVIEW

15.2.11 PARKER HANNIFIN CORP

TABLE 310 PARKER HANNIFIN CORP: COMPANY OVERVIEW

15.2.12 NEWAGE INDUSTRIES

TABLE 311 NEWAGE INDUSTRIES: COMPANY OVERVIEW

15.2.13 ACCURATE PRODUCTS

TABLE 312 ACCURATE PRODUCTS: COMPANY OVERVIEW

15.2.14 SIC

TABLE 313 SIC: COMPANY OVERVIEW

15.2.15 SANDEN VIKAS (INDIA) LTD.

TABLE 314 SANDEN VIKAS (INDIA) LTD.: COMPANY OVERVIEW

*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices made, Weaknesses and competitive threats might not be captured in case of unlisted companies.

16 APPENDIX

16.1 KEY INSIGHTS FROM INDUSTRY EXPERTS

16.2 DISCUSSION GUIDE

16.3 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

16.4 CUSTOMIZATION OPTIONS

16.4.1 FLUID TRANSFER SYSTEM MARKET, BY BATTERY COOLING APPLICATION

16.4.1.1 BEV

16.4.1.2 PHEV

16.4.1.3 MILD HYBRID

16.4.2 ELECTRIC & HYBRID VEHICLE FLUID TRANSFER SYSTEM MARKET, BY TYPE

16.4.2.1 Air suspension lines

16.4.2.2 AC lines

16.4.2.3 Battery cooling lines

16.4.2.4 Transmission oil cooling lines

16.4.2.5 Fuel lines

16.4.2.6 Brake lines

16.5 RELATED REPORTS

16.6 AUTHOR DETAILS

I would like to order

Product name: Fluid Transfer System Market by System (Brake, Fuel, AC, Air Suspension, DPF, SCR, Transmission Oil, Turbo Coolant, Engine & Battery Cooling, Air Brake), Material (Al, Rubber, Nylon, Steel, Stainless Steel), On & Off-Highway, EV & Region - Global Forecast to 2027

Product link: <https://marketpublishers.com/r/FF553766BDFEN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/FF553766BDFEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below
and fax the completed form to +44 20 7900 3970