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Automotive Fuel Tank Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Capacity (Less than 45 liters, 45-70 liters, and Above 70 liters), By Material Type (Plastic, Aluminum, and Steel), By Region & Competition, 2021-2031F

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Abstracts

The Global Automotive Fuel Tank Market is projected to expand from USD 21.65 Billion in 2025 to USD 27.74 Billion by 2031, reflecting a CAGR of 4.22%. These specialized vessels, designed to safely store and deliver volatile propellants like diesel or gasoline to internal combustion engines, are supported by consistent global vehicle manufacturing volumes. This demand is particularly strong in emerging economies where traditional powertrains remain vital, alongside a growing shift toward lightweight polymer materials that improve fuel economy and emission compliance. Underlining this continued need, the International Organization of Motor Vehicle Manufacturers reported that global motor vehicle production reached 92.5 million units in 2024.

However, the industry faces a substantial obstacle due to the rapid worldwide transition toward electrification. The expanding market share of battery electric vehicles, which eliminates the need for fossil fuel storage, directly curtails the total addressable market. This structural shift is hastened by strict government environmental regulations, presenting a formidable long-term challenge as automakers increasingly redirect investment and resources from internal combustion technologies toward zero-emission platforms.

Market Driver

The urgent need for lightweight materials to improve fuel efficiency is a primary force driving the transition from traditional steel to High-Density Polyethylene (HDPE) fuel

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tanks. To meet stringent environmental regulations, automakers are aggressively reducing vehicle mass, leading to the broad adoption of multilayer blow-molded plastic tanks that offer superior design flexibility and corrosion resistance compared to steel. This shift is essential for meeting future efficiency targets; for instance, the National Highway Traffic Safety Administration?s June 2024 standards mandate a fleet average of approximately 50.4 miles per gallon by 2031, creating a direct incentive for integrating lighter fuel storage components.

Simultaneously, the rising penetration of Hybrid Electric Vehicles (HEVs), especially Plug-in Hybrid Electric Vehicles (PHEVs), is sustaining demand for advanced pressurized fuel storage solutions. Unlike standard engines that continuously release vapors, PHEVs require specialized sealed tanks to withstand high internal pressure during electric-only driving, preserving value in the supply chain despite broader electrification. According to the China Association of Automobile Manufacturers in September 2024, PHEV sales surged 81.9% year-on-year, illustrating strong growth in this segment. This niche expansion complements overall market stability, as evidenced by the European Automobile Manufacturers' Association reporting a 4.5% rise in EU passenger car registrations during the first half of 2024.

Market Challenge

The rapid global shift toward electrification serves as a structural impediment to the Global Automotive Fuel Tank Market. Unlike internal combustion engine vehicles that necessitate specialized vessels for liquid propellants, battery electric vehicles (BEVs) rely on electrochemical energy storage, thereby removing the requirement for a traditional fuel tank. This technological replacement not only suppresses demand but permanently diminishes the total addressable market for fuel systems. As automotive original equipment manufacturers increasingly reallocate production capacity from combustion engines to zero-emission platforms, the volume of fuel tanks needed for new vehicle assembly faces a direct and irreversible decline.

The magnitude of this market displacement is evident in the world?s largest automotive manufacturing hub, where the departure from fossil fuels is accelerating. Data from the China Association of Automobile Manufacturers indicates that in 2024, sales of new energy vehicles reached 12.87 million units, capturing 40.9% of the total automobile market. This statistic reveals that a significant proportion of new vehicle production has effectively exited the fuel tank ecosystem. Consequently, the industry confronts a narrowing customer base as the prevalence of electric mobility directly reduces the global volume of conventional storage components required.

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Market Trends

The integration of smart fuel management sensors and electronics is evolving fuel tanks from passive storage vessels into active diagnostic components. With increasing vehicle architecture complexity, original equipment manufacturers are demanding fuel systems that provide granular real-time data regarding leakage detection, pressure variance, and fuel quality to optimize performance and safety. This transition toward electronically integrated systems allows suppliers to maintain value even as total unit volumes stabilize. For example, TI Fluid Systems reported in March 2025 that it expanded its Adjusted EBIT margin to 7.8% despite a revenue decline, a performance driven by operational efficiency and a focus on advanced fluid handling products, highlighting the financial resilience provided by high-tech integration.

Concurrently, the increasing utilization of recycled and bio-based polymer materials is reshaping sourcing strategies to align with global circular economy mandates. Automotive manufacturers are actively seeking to lower supply chain carbon footprints by replacing virgin high-density polyethylene with sustainable alternatives that maintain rigorous durability standards. This focus on eco-design facilitates compliance with stricter end-of-life vehicle directives and reduces the embodied carbon of internal combustion platforms. OPmobility?s March 2025 report reflects this trend, showing a 2.2% year-over-year revenue increase to ?11.6 billion, attributed to a strategic transformation toward sustainable mobility solutions that prioritize the development and integration of recycled materials.

Key Market Players

Plastic Omnium

Kautex

Yachiyo

TI Fluid Systems

YAPP

Magna

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Unipres

FTS

Futaba

Martinrea

Report Scope

In this report, the Global Automotive Fuel Tank Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Fuel Tank Market, By Capacity

Less than 45 liters

45-70 liters

Above 70 liters

Automotive Fuel Tank Market, By Material Type

Plastic

Aluminum

Steel

Automotive Fuel Tank Market, By Region

North America

United States

Canada

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- Mexico

Europe

- France
- United Kingdom
- Italy
- Germany
- Spain

Asia Pacific

- China
- India
- Japan
- Australia
- South Korea

South America

- Brazil
- Argentina
- Colombia

Middle East & Africa

- South Africa
- Saudi Arabia

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UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Fuel Tank Market.

Available Customizations:

Global Automotive Fuel Tank Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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