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Commercial Vehicle Fuel System Valves Market - Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By Valve Types (Fuel Shut-off Valves, Fuel Control Valves, Fuel Tank Valves, Pressure Regulating Valves, Fuel Check Valves), By Vehicle Type (LCV, M&HCV), By Fuel Type (Gasoline and Diesel) By Region & Competition, and By Competition, 2021-2031F

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Abstracts

The Global Commercial Vehicle Fuel System Valves Market is projected to expand from USD 5.03 Billion in 2025 to USD 7.31 Billion by 2031, achieving a CAGR of 6.43%. These valves are essential electromechanical devices that regulate the direction, pressure, and flow of fuel within an engine to guarantee peak combustion efficiency. The market is largely sustained by the enforcement of strict global emission mandates that necessitate precise fuel metering, alongside the continued growth of the construction and logistics industries which depend heavily on diesel fleets. Highlighting the scale of this demand, the International Organization of Motor Vehicle Manufacturers (OICA) noted that commercial vehicle production in China hit approximately 3.8 million units in 2024, demonstrating the immense volume of powertrain components needed to support global industrial transport.

One major obstacle impeding market growth is the automotive industry's rapid shift toward electrification. As fleet operators and governments increasingly prioritize hydrogen technologies and Battery Electric Vehicles to reach carbon neutrality goals, the long-term requirement for internal combustion engine parts is facing a structural decline. This transition forces traditional manufacturers to redirect resources toward

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electric propulsion systems, thereby restricting investment opportunities and growth potential within the conventional fuel valve sector.

Market Driver

The enforcement of stringent government emission regulations serves as a primary driver for technological innovation in the fuel system valves industry. Authorities globally are enacting progressively tighter limits on particulate matter and nitrogen oxides, pushing manufacturers to refine fuel combustion processes via precise injection timing and metering. These mandates require the integration of advanced electromechanical valves that can manage higher pressures and complex injection strategies to ensure compliance without reducing engine performance. For example, a May 2024 press release from the European Council regarding CO2 emission standards for heavy-duty vehicles established a binding target to cut carbon emissions from new heavy-duty trucks by 45 percent starting in 2030, a regulation that compels OEMs to upgrade conventional fuel architectures with specialized control valves for cleaner combustion.

Concurrently, the robust expansion of the e-commerce and logistics transportation sectors is stimulating demand for both heavy and light commercial vehicles. The surge in freight movement and online retail necessitates durable fleets capable of high-frequency operation, which increases the consumption of engine components and drives both aftermarket sales and new production. According to the 'New Commercial Vehicle Registrations' report by the European Automobile Manufacturers? Association (ACEA) in August 2024, new van sales in the European Union rose by 15 percent to 840,409 units in the first half of the year. Additionally, Daimler Truck reported in March 2024 that it achieved global unit sales of 526,053 trucks and buses for the 2023 fiscal year, underscoring the consistent industrial need for reliable fuel regulation components to maintain global supply chain efficiency.

Market Challenge

The accelerating move of the global automotive industry toward electrification constitutes a fundamental structural barrier to the growth of the commercial vehicle fuel system valves market. Since fuel system valves are integral to internal combustion engines for regulating diesel and gasoline delivery, the aggressive prioritization of zero-emission technologies by governments and fleet operators diminishes the necessity for these specialized components. This technological displacement lowers the Total Addressable Market (TAM) for traditional valve manufacturers, as battery electric vehicles utilize distinct thermal and propulsion management systems that do not require

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combustion fuel metering.

This shift is quantifiable through recent adoption rates of non-combustion heavy-duty vehicles. Data from the European Automobile Manufacturers? Association in 2024 indicates that registrations of electrically chargeable lorries within the European Union jumped by 51.6% in the first half of the year compared to the same period in 2023. Such rapid growth in the electric commercial segment forces Original Equipment Manufacturers (OEMs) to divert capital expenditure and R&D resources away from legacy internal combustion components. Consequently, the conventional fuel valve sector faces shrinking investment and volume erosion, directly hampering its expansion potential despite the ongoing logistical activities in the broader transport industry.

Market Trends

There is an accelerating adoption of advanced CNG and LNG safety valves as fleet operators increasingly turn to natural gas powertrains to reduce operational costs and emissions without the range anxiety associated with battery electric systems. This trend is driving the engineering of specialized electronic shut-off and high-flow thermal relief valves designed to manage cryogenic temperatures and maintain system integrity under heavy loads. The growing demand for these robust fuel regulation components is evidenced by major manufacturers expanding their gas-powered portfolios; for instance, Volvo Trucks reported in a June 2025 press release that its global sales of gas-powered trucks increased by more than 25 percent in 2024, signaling a sustained need for reliable natural gas valve architectures in the heavy-duty sector.

At the same time, the integration of high-pressure valves for hydrogen powertrains is reshaping the component landscape, necessitating materials that can withstand hydrogen embrittlement and seal effectively at pressures exceeding 700 bar. As manufacturers develop hydrogen internal combustion engines and fuel cell technologies, the supply chain is shifting toward precision valves that ensure safe storage and injection control. This technological realignment is creating significant revenue streams for specialized suppliers, as highlighted by Westport Fuel Systems in its August 2025 'Q2 2025 Earnings Call', where the company revealed that over 50 percent of its high-pressure controls revenue now originates from China, driven almost entirely by the demand for hydrogen-specific components.

Key Market Players

Mahle Group

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Knorr-Bremse AG

Hitachi Ltd.

Federal-Mogul Holdings Corp

Eaton Corporation Plc.

Denso Corporation

FUJI OOZX Inc.

FTE automotive GmbH

Delphi Automotive PLC

Continental AG

Report Scope

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

Commercial Vehicle Fuel System Valves Market, By Valve Types

Fuel Shut-off Valves

Fuel Control Valves

Fuel Tank Valves

Pressure Regulating Valves

Fuel Check Valves

Commercial Vehicle Fuel System Valves Market, By Vehicle Type

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- LCV
- M&HCV

Commercial Vehicle Fuel System Valves Market, By Fuel Type

- Gasoline
- Diesel

Commercial Vehicle Fuel System Valves Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia Pacific
  - China
  - India

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Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Commercial Vehicle Fuel System Valves Market.

Available Customizations:

Global Commercial Vehicle Fuel System Valves 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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