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Light Commercial Vehicles Pumps Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Pump Type (Transmission Pump, Fuel pump, Oil Pump, steering Pump, Water Pump, Vacuum Pump), By Technology Type (Mechanical, Electrical), By Sales Channel (OEM, Aftermarket), By Region & Competition, 2021-2031F

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Abstracts

The Global Light Commercial Vehicles Pumps Market is projected to expand from USD 4.68 Billion in 2025 to USD 6.79 Billion by 2031, reflecting a compound annual growth rate of 6.41%. This industry encompasses the production and supply of essential mechanical and electronic components designed to circulate fluids?including fuel, oil, coolant, and steering fluid?within light utility vehicles such as vans and pickup trucks. A key factor propelling this market is the continued growth of the e-commerce landscape, which demands reliable fleets for effective last-mile delivery operations. Furthermore, rising global infrastructure and construction projects heighten the need for rugged light trucks, thereby sustaining the demand for high-performance pumps to ensure vehicle durability and operational consistency.

Despite these growth prospects, the market faces hurdles related to supply chain instability and shifting raw material costs, which can retard production schedules and elevate expenses for component manufacturers. These economic strains can negatively influence fleet renewal strategies and impact profit margins throughout the supply chain. Nevertheless, the core demand for commercial transport remains robust in key territories. For instance, data from the European Automobile Manufacturers' Association indicates that in 2024, sales of new vans in the European Union rose by 8.3 percent, totaling 1,586,688 units. This upward trend highlights the sector's resilience and the

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enduring need for vital vehicle components like pumps.

Market Driver

The accelerating electrification of light commercial vehicle fleets is fundamentally transforming the market by mandating a transition from traditional mechanical systems to sophisticated electric pump technologies. As logistics providers adopt battery-electric models to comply with sustainability regulations, there is an urgent need for specialized electric coolant pumps for battery thermal management and electric power steering pumps that function independently of internal combustion engines. This shift is increasingly evident in major regions, as seen in the rising adoption of zero-emission utility vehicles; for example, Ford Motor Company reported in October 2024 that sales of the E-Transit electric van in the United States grew by 13 percent in the third quarter year-over-year, underscoring the integration of electrified transport.

Simultaneously, the rapid growth of e-commerce and last-mile delivery logistics serves as a primary driver for volume, stimulating the need for durable fuel and oil circulation systems in standard and hybrid vans. The rigorous demands of delivery routes, defined by high mileage and frequent stop-start cycles, require robust pump replacements to maintain fleet reliability and uptime. This has led to sustained demand for commercial vans designed for these specific logistical tasks, especially in urban environments. In the UK, the Society of Motor Manufacturers and Traders reported in January 2025 that registrations of medium-sized vans increased by 12.3 percent in 2024. On a broader scale, the European Automobile Manufacturers' Association noted that new van registrations in the EU rose by 8.5 percent during the first nine months of 2024, indicating continued sector momentum.

Market Challenge

Supply chain instability and the fluctuation of raw material prices present significant obstacles to the Global Light Commercial Vehicles Pumps Market. Producing high-performance pumps necessitates a reliable supply of metals like steel and aluminum, as well as electronic parts for advanced electric pump models. When supply chains break down or raw material costs rise abruptly, manufacturers of pumps encounter immediate production setbacks and increased operating costs. These disruptions inevitably affect light commercial vehicle assembly, potentially forcing manufacturers to decelerate production or raise prices to cover the higher cost of components.

This economic volatility directly reduces the frequency with which fleet operators and

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logistics firms expand or replace their vehicles, subsequently lowering the industry's demand for new pumps. The consequences of these persistent challenges are reflected in recent market data. According to the European Automobile Manufacturers' Association, new van registrations in the EU fell by 8.2 percent during the first nine months of 2025. This decline demonstrates how cost pressures and supply constraints are actively curtailing vehicle production and demand, thereby restricting the opportunities for pump manufacturers to distribute their products.

Market Trends

Manufacturers are increasingly adopting Variable Displacement Oil Pumps to optimize fuel efficiency in internal combustion engine vehicles, which remain a dominant force in the light commercial vehicle market. Despite the attention on electrification, the enduring presence of diesel-powered vans necessitates the use of advanced hydraulic systems that minimize parasitic engine load and meet strict emissions regulations. This dependence on combustion engines for heavy-duty operations is supported by recent data; the European Automobile Manufacturers' Association reported in January 2025 that diesel van registrations in the EU grew by 10.5 percent in 2024, highlighting the continued necessity for mechanical pump innovations to support this large traditional fleet.

In parallel, the incorporation of pumps into Intelligent Thermal Management Modules is emerging as a standard practice to manage the thermal intricacies of modern electric and hybrid powertrains. Instead of using separate components, engineers are consolidating valves, coolant pumps, and reservoirs into compact, unified systems that precisely control temperatures for power electronics, batteries, and passenger cabins, thereby enhancing range and durability. This trend is being driven by the rising popularity of complex hybrid systems requiring multi-loop thermal regulation. For instance, Renault Group announced in January 2025 that its full-hybrid vehicle sales in Europe rose by 30 percent, indicating a clear shift toward vehicles that require these integrated pumping technologies.

Key Market Players

Denso Corporation

Aisin Corporation

Continental AG

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Robert Bosch GmbH

Magna International Inc.

Johnson Electric Holdings Limited

Mikuni Corporation

Mitsubishi Electric Corporation

Rheinmetall Automotive

SHW AG

Report Scope

In this report, the Global Light Commercial Vehicles Pumps Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Light Commercial Vehicles Pumps Market, By Pump Type

Transmission Pump

Fuel pump

Oil Pump

steering Pump

Water Pump

Vacuum Pump

Light Commercial Vehicles Pumps Market, By Technology Type

Mechanical

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- Electrical

Light Commercial Vehicles Pumps Market, By Sales Channel

- OEM
- Aftermarket

Light Commercial Vehicles Pumps Market, By Region

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

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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 Light Commercial Vehicles Pumps Market.

Available Customizations:

Global Light Commercial Vehicles Pumps 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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