

# Automotive Electric Vacuum Pump Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Electric Vehicle Type (BEV, HEV, PHEV), By Vehicle Type (Passenger Car, LCV, HCV), By Region, Competition, 2018-2028

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## Abstracts

Global Automotive Electric Vacuum Pump Market has valued at USD 1.4 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 9.47% through 2028. The global automotive electric vacuum pump market is experiencing a significant growth trajectory, primarily fueled by the increasing demand for fuel-efficient vehicles and the implementation of stringent emission regulations worldwide. As the automotive industry strives to achieve sustainability goals, electric vacuum pumps have emerged as a preferred choice over their mechanical counterparts. These electric vacuum pumps offer improved efficiency and performance, contributing to reduced emissions and enhanced overall vehicle performance. With their advanced technology and ability to optimize energy usage, electric vacuum pumps are revolutionizing the automotive sector and playing a vital role in shaping the future of transportation.

According to industry analysts, the global market for automotive electric vacuum pumps is projected to experience significant growth during the forecast period. This growth can be attributed to the ongoing global shift towards electric vehicles (EVs), which play a crucial role in reducing carbon emissions and promoting sustainability. As EVs continue to gain popularity, the demand for electric vacuum pumps, an essential component in these vehicles, is expected to rise steadily. The adoption of EVs not only contributes to a cleaner environment but also drives the development and innovation of electric vacuum pump technology, leading to further advancements in the automotive industry.

The market is fragmented with the presence of several global and regional players who

compete on the basis of price, quality, and technological advancement. Key players in the market include Hella, Denso, Continental, and Bosch. These players are investing significantly in R&D activities to develop technologically advanced and efficient vacuum pumps.

Geographically, the Asia-Pacific region is taking the lead in the market due to its rapid industrialization and the significant uptake of electric vehicles (EVs) in countries such as China and Japan. This can be attributed to various factors, including the growing demand for sustainable transportation solutions, government incentives promoting EV adoption, and a well-developed charging infrastructure.

Following closely behind, Europe and North America are also experiencing considerable growth in the EV market. This can be attributed to increasing environmental concerns and the implementation of stringent government regulations aimed at reducing vehicle emissions. Additionally, advancements in EV technology, such as longer battery range and improved charging infrastructure, have further propelled the adoption of electric vehicles in these regions.

Overall, the global market for electric vehicles is witnessing a remarkable shift towards sustainable and environmentally-friendly transportation solutions, with the Asia-Pacific region leading the way, closely followed by Europe and North America.

While the market presents ample growth opportunities, it is not devoid of challenges. One of the primary obstacles is the high cost associated with electric vacuum pumps, which can limit their widespread adoption. Additionally, the lack of infrastructure for electric vehicles (EVs) in developing countries poses a significant hurdle for market expansion. Overcoming these challenges will require innovative solutions, such as cost reduction strategies and investments in EV charging infrastructure to create a more conducive environment for EV adoption and market growth.

Despite the challenges, the market outlook remains positive. Industry experts predict that the rise in autonomous and smart vehicles will further propel the demand for electric vacuum pumps. Moreover, as governments worldwide continue to push for cleaner and greener transportation modes, the role of automotive electric vacuum pumps will become more significant.

In conclusion, the global automotive electric vacuum pump market is set for robust growth driven by factors such as increasing demand for EVs, stringent emission regulations, and technological advancements in the automotive industry. However, to

fully realize its potential, overcoming challenges related to cost and infrastructure will be key.

## Key Market Drivers

### Surge in Electric Vehicle Adoption

One of the key drivers propelling the Global Automotive Electric Vacuum Pump Market is the significant surge in the adoption of electric vehicles (EVs). As the automotive industry undergoes a transformative shift toward electrification, with a growing emphasis on sustainability and reduced reliance on traditional internal combustion engines, the demand for electric vacuum pumps is witnessing a corresponding rise.

Electric vehicles operate on electric power rather than traditional fuels, presenting distinct challenges and opportunities for braking systems. Unlike internal combustion engines that generate vacuum pressure through engine operation, electric vehicles lack this inherent vacuum source. As a result, electric vacuum pumps become crucial components, providing the necessary vacuum pressure for power brakes to operate effectively. The expanding market for electric vehicles, driven by environmental concerns and government incentives, directly contributes to the increased demand for automotive electric vacuum pumps.

### Regulatory Emphasis on Fuel Efficiency and Emissions Reduction

Stringent regulatory standards globally are playing a pivotal role in driving the adoption of automotive electric vacuum pumps. Governments and environmental agencies are placing increased emphasis on fuel efficiency and the reduction of vehicular emissions to combat climate change and air pollution. In response, automakers are actively incorporating electric vacuum pumps in both conventional and electric vehicles to optimize brake performance and enhance overall vehicle efficiency.

Electric vacuum pumps contribute to fuel efficiency by reducing the load on the internal combustion engine. In traditional vehicles, the engine generates vacuum pressure, consuming additional fuel in the process. However, electric vacuum pumps operate independently, consuming less power and thereby improving fuel efficiency. Compliance with stringent emission norms and fuel efficiency standards prompts automakers to integrate electric vacuum pumps as a strategic measure to align with regulatory requirements.

## Advancements in Electric Vacuum Pump Technology

Technological advancements in electric vacuum pump design and functionality represent a significant driver for market growth. Ongoing research and development efforts are focused on enhancing the efficiency, durability, and performance of electric vacuum pumps to meet the evolving needs of the automotive industry. Innovations in pump design, materials, and manufacturing processes contribute to the development of compact, lightweight, and energy-efficient electric vacuum pumps.

The integration of advanced materials, such as lightweight composites and high-strength alloys, reduces the overall weight of the pump, contributing to vehicle weight savings and improved efficiency. Additionally, innovations in pump technology aim to minimize noise levels, vibration, and power consumption. These advancements are particularly critical for electric vehicles, where optimizing energy usage and minimizing auxiliary system noise are paramount for enhancing the overall driving experience.

## Increasing Demand for Enhanced Vehicle Safety Features

The growing consumer demand for enhanced vehicle safety features is another driving force behind the Global Automotive Electric Vacuum Pump Market. Vehicle safety has become a top priority for consumers, and automakers are continually introducing advanced safety technologies to meet these expectations. Electric vacuum pumps play a crucial role in ensuring the optimal functioning of power brake systems, contributing to overall vehicle safety.

In emergency braking situations, quick and efficient brake response is essential for preventing accidents and minimizing the severity of collisions. Electric vacuum pumps provide the necessary vacuum pressure for power brakes, enabling rapid and effective braking even in challenging conditions. As consumers increasingly prioritize safety features, the demand for vehicles equipped with electric vacuum pumps is expected to rise, fostering market growth.

## Integration with Advanced Driver Assistance Systems (ADAS)

The integration of electric vacuum pumps with Advanced Driver Assistance Systems (ADAS) represents a significant driver for market expansion. ADAS technologies, such as autonomous emergency braking (AEB) and adaptive cruise control, rely on precise and responsive brake systems to ensure the safety of both the vehicle occupants and pedestrians. Electric vacuum pumps play a crucial role in maintaining the optimal

vacuum pressure required for the seamless operation of these advanced braking systems.

As automakers embrace the development and deployment of ADAS, the demand for electric vacuum pumps that can complement and enhance these systems is on the rise. The integration of electric vacuum pumps with ADAS contributes to the overall safety and effectiveness of these systems, supporting the automotive industry's transition toward more autonomous and connected vehicles.

## Key Market Challenges

### Limited Consumer Awareness and Education

One of the primary challenges facing the Global Automotive Electric Vacuum Pump Market is the limited awareness and education among consumers regarding the role and significance of electric vacuum pumps in modern vehicles. Unlike visible and tangible automotive components, such as exterior design features or infotainment systems, electric vacuum pumps operate behind the scenes within the vehicle's braking system.

Consumers, especially those less familiar with automotive technology, may not fully understand the crucial role electric vacuum pumps play in ensuring efficient brake performance. The lack of awareness can lead to challenges in market penetration, as consumers may not actively seek or prioritize vehicles equipped with electric vacuum pumps. To address this challenge, industry stakeholders, including automakers and suppliers, need to invest in comprehensive education and awareness campaigns to highlight the benefits and importance of electric vacuum pump technology in enhancing vehicle safety and performance.

### Cost Implications and Affordability Concerns

The Global Automotive Electric Vacuum Pump Market faces challenges related to cost implications and affordability concerns, both for manufacturers and consumers. The integration of electric vacuum pumps involves additional components, including the pump itself, sensors, and electronic control units (ECUs), contributing to the overall cost of the vehicle. This cost increment can be a critical factor, particularly for price-sensitive consumers and in competitive market segments.

Manufacturers, striving to balance the incorporation of advanced technologies with the

affordability of their vehicles, face the challenge of optimizing the cost-effectiveness of electric vacuum pump systems. While electric vacuum pumps contribute to fuel efficiency and safety, ensuring that the cost of these systems does not compromise the overall market competitiveness of vehicles becomes crucial. Moreover, in markets where consumer purchasing decisions are heavily influenced by price considerations, automakers must navigate the delicate balance between meeting regulatory standards and offering affordable vehicle options.

### Integration Challenges with EV Powertrains

The rising adoption of electric vehicles (EVs) presents a unique challenge for the integration of electric vacuum pumps within the context of EV powertrains. Unlike traditional internal combustion engine vehicles that generate vacuum pressure as a byproduct of engine operation, electric vehicles lack this inherent vacuum source. Therefore, EVs require electric vacuum pumps to create the necessary vacuum pressure for power brake systems to function optimally.

The integration challenge arises in adapting electric vacuum pump systems to the specific powertrain architectures of electric vehicles. EVs have diverse powertrain configurations, including battery electric vehicles (BEVs) and plug-in hybrid electric vehicles (PHEVs), each with its unique design and packaging considerations. Manufacturers need to develop electric vacuum pump solutions that seamlessly integrate with the various EV powertrain layouts, ensuring compatibility, efficiency, and optimal space utilization.

Furthermore, the electrification trend encompasses a shift toward increased electrification of auxiliary systems within vehicles, including power steering and HVAC systems. As these systems become electrically powered, the demand for electric vacuum pumps may further intensify, necessitating integrated solutions that can effectively cater to the evolving landscape of electric powertrains.

### Reliability and Durability Concerns

The reliability and durability of electric vacuum pump systems pose significant challenges for the Global Automotive Electric Vacuum Pump Market. Electric vacuum pumps are critical components responsible for ensuring the proper functioning of power brake systems, especially in emergency braking scenarios. As such, these systems must exhibit a high level of reliability to instill confidence in both manufacturers and consumers.

Reliability concerns encompass the ability of electric vacuum pumps to operate consistently under various driving conditions, temperature extremes, and over extended periods of use. Given the safety-critical nature of brake systems, any failure or malfunction in the electric vacuum pump could compromise overall vehicle safety. Manufacturers face the challenge of developing electric vacuum pumps that meet stringent reliability standards and can withstand the rigorous demands of real-world driving scenarios.

Durability is another aspect that adds complexity to the challenge. Electric vacuum pumps must endure the harsh conditions of the automotive environment, including exposure to vibrations, thermal cycling, and potential contaminants. Ensuring the longevity of electric vacuum pump systems becomes crucial for minimizing maintenance requirements and enhancing the overall ownership experience for consumers. Meeting these reliability and durability expectations necessitates thorough testing, quality control measures, and ongoing advancements in materials and design.

### Global Supply Chain Disruptions and Component Shortages

The Global Automotive Electric Vacuum Pump Market is not immune to the challenges posed by global supply chain disruptions and component shortages. The automotive industry relies on a complex and interconnected global supply chain, with components sourced from various regions. Disruptions, whether due to geopolitical events, natural disasters, or unforeseen global crises, can impact the availability of key components, including electric vacuum pumps and their associated parts.

The COVID-19 pandemic has underscored the vulnerability of global supply chains, leading to shortages of semiconductor chips, essential for the operation of electronic components in vehicles, including those within electric vacuum pump systems. Component shortages can result in production delays, increased costs, and challenges in meeting market demand. Manufacturers in the Automotive Electric Vacuum Pump Market must navigate these uncertainties, adopt agile supply chain strategies, and explore alternative sourcing options to mitigate the risks associated with global disruptions.

### Key Market Trends

#### Increasing Electrification of Vehicle Platforms

A prominent trend shaping the Global Automotive Electric Vacuum Pump Market is the accelerating electrification of vehicle platforms. The automotive industry is undergoing a profound transformation as electric vehicles (EVs) and hybrid electric vehicles (HEVs) gain widespread acceptance. The shift toward electrification is driven by environmental concerns, government incentives, and advancements in battery technology. As internal combustion engines are gradually replaced by electric powertrains, the role of electric vacuum pumps becomes pivotal in ensuring optimal brake performance.

In traditional vehicles with internal combustion engines, vacuum pressure for brake systems is generated as a byproduct of engine operation. However, electric vehicles lack this inherent vacuum source, necessitating the integration of electric vacuum pumps. This trend aligns with the broader industry goal of reducing carbon emissions and enhancing overall vehicle efficiency. Manufacturers in the Automotive Electric Vacuum Pump Market are responding to this trend by developing innovative and compact electric vacuum pump solutions tailored to the evolving requirements of electrified vehicle architectures.

### Growing Emphasis on Energy Efficiency

The Global Automotive Electric Vacuum Pump Market is witnessing a growing emphasis on energy efficiency as automakers strive to enhance the overall efficiency of electric and hybrid vehicles. Electric vacuum pumps play a crucial role in this context by optimizing the energy consumption of brake systems. Unlike traditional engine-driven vacuum pumps that can contribute to increased fuel consumption, electric vacuum pumps operate on-demand, consuming power only when necessary.

The focus on energy efficiency is particularly significant in electric vehicles, where every kilowatt-hour of energy is precious for maximizing driving range. Electric vacuum pumps contribute to energy savings by providing vacuum assistance to power brakes without the need for constant engine operation. Manufacturers are investing in research and development to improve the energy efficiency of electric vacuum pump systems, exploring advanced materials, design optimizations, and smart control algorithms to minimize power consumption while ensuring optimal brake performance.

### Integration of Smart and Connected Features

An emerging trend in the Automotive Electric Vacuum Pump Market is the integration of smart and connected features within electric vacuum pump systems. As vehicles become more connected and technologically advanced, electric vacuum pumps are



evolving beyond their traditional role as standalone components. Integration with vehicle communication networks and advanced driver assistance systems (ADAS) enables electric vacuum pumps to operate in a more intelligent and context-aware manner.

Smart electric vacuum pump systems can communicate with other vehicle components, sensors, and control units to optimize their operation based on real-time driving conditions. For example, these systems can adjust vacuum pressure levels during emergency braking scenarios detected by ADAS, contributing to more responsive and precise brake performance. The integration of connectivity features also facilitates remote diagnostics, allowing vehicle manufacturers and service providers to monitor the health and performance of electric vacuum pump systems, leading to proactive maintenance and improved reliability.

### Lightweight and Compact Design Innovations

A noteworthy trend in the Global Automotive Electric Vacuum Pump Market is the focus on lightweight and compact design innovations. As the automotive industry prioritizes weight reduction for both traditional and electric vehicles, manufacturers are exploring materials and design strategies to create electric vacuum pumps that are lighter, more compact, and easier to integrate into diverse vehicle architectures.

Lightweight electric vacuum pumps contribute to overall vehicle weight savings, enhancing energy efficiency and driving performance. Furthermore, compact designs allow for flexible placement within the vehicle, optimizing space utilization and supporting the evolving trend of electrified powertrains. Manufacturers are leveraging advanced materials such as high-strength alloys and lightweight composites to achieve weight reduction without compromising the structural integrity and durability of electric vacuum pump systems.

### Integration with Regenerative Braking Systems

An advancing trend in the Automotive Electric Vacuum Pump Market is the integration of electric vacuum pumps with regenerative braking systems. Regenerative braking technology, commonly found in electric and hybrid vehicles, captures and stores kinetic energy during braking, converting it into electrical energy to recharge the vehicle's battery. While regenerative braking is highly efficient for energy recovery, it poses challenges for traditional vacuum-assisted brake systems that rely on engine-generated vacuum pressure.

Electric vacuum pumps address this challenge by providing vacuum assistance to the brake system, ensuring optimal brake performance even during regenerative braking events. This integration enhances the overall efficiency of regenerative braking systems and contributes to a seamless transition between regenerative and friction braking. Manufacturers are aligning their product offerings with this trend, developing electric vacuum pump solutions that seamlessly integrate with regenerative braking architectures to maximize energy recovery and braking efficiency.

## Segmental Insights

### Electric Vehicle Type Analysis

The global Automotive Electric Vacuum Pump Market is experiencing substantial growth due to the increasing demand for electric vehicles (EVs). Various types of EVs like hybrid electric vehicles (HEVs), plug-in hybrid electric vehicles (PHEVs), and battery electric vehicles (BEVs) rely heavily on electric vacuum pumps for enhancing performance and energy efficiency. These pumps play a crucial role in maintaining the power braking system, which is vital for the safety and comfort of EVs. This growing utility of electric vacuum pumps, coupled with governmental policies encouraging the adoption of EVs, is propelling the expansion of the Automotive Electric Vacuum Pump Market.

### Vehicle Type Analysis

The global Automotive Electric Vacuum Pump market is observing a significant surge, driven by the shift towards electric and hybrid vehicles worldwide. As an integral component of electric vehicles, these pumps play a critical role in providing enhanced brake performance and efficiency. They fall into several categories based on vehicle type, including passenger cars, commercial vehicles, and two-wheelers. Passenger cars dominate the market due to the increasing demand for comfort and safety features. However, the commercial vehicles segment is projected to grow at a substantial rate, given the rising trend of electrification in this sector.

## Regional Insights

Regional insights reveal a dynamic landscape in the global Automotive Electric Vacuum Pump market. Asia-Pacific is leading the charge, thanks to escalating demand for electric vehicles, stringent environmental policies, and strong governmental support for EV infrastructure. Europe follows closely, with its robust automotive industry and rising

consumer preference for energy-efficient vehicles. North America, with its advanced technology adoption and significant investments in research and development, is another pivotal player in the market. However, all regions are anticipated to witness substantial growth, courtesy of the global shift toward sustainable transportation solutions.

### Key Market Players

Hella GmbH & Co. KGaA

Rheinmetall Automotive AG

Continental AG

Youngshin Precision Co., Ltd.

Tuopu Group

Mikuni Corp.

Robert Bosch GmbH

### Report Scope:

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

Automotive Electric Vacuum Pump Market, By Electric Vehicle Type:

BEV

HEV

PHEV

Automotive Electric Vacuum Pump Market, By Vehicle Type:

Passenger Car

LCV

HCV

Automotive Electric Vacuum Pump Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Electric Vacuum Pump Market.

## Available Customizations:

Global Automotive Electric Vacuum Pump Market report with the given market data, Tech Sci 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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