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Automotive Pumps Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Fuel Pump, Oil Pump, Steering Pump, Water Pump, Fuel Injection Pump, and Others), By Technology (Mechanical, and Electrical), By Vehicle Type (Passenger Cars, Light Commercial Vehicles, Heavy Commercial Vehicles, and Two Wheelers), By Region & Competition, 2021-2031F

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Abstracts

The Global Automotive Pumps Market is projected to expand from USD 14.91 Billion in 2025 to USD 24.41 Billion by 2031, achieving a CAGR of 8.56%. Automotive pumps, encompassing both mechanical and electric devices, are essential for circulating fluids like fuel, oil, and coolant to ensure efficient vehicle operation. The market is driven by increasing global vehicle manufacturing and the transition toward electrification, which necessitates specialized electric pumps for thermal management. This demand is fundamentally supported by manufacturing volumes, as every vehicle relies on multiple pump systems; according to the International Organization of Motor Vehicle Manufacturers, global motor vehicle production reached 92.5 million units in 2024.

A significant obstacle impeding market growth is the volatility of raw material costs, which disrupts production stability and squeezes profit margins. Unpredictable prices for essential materials such as aluminum, steel, and electronics create financial strain, complicating strategic planning for suppliers. This economic uncertainty creates a difficult environment for manufacturers, who must struggle to maintain competitive pricing while simultaneously adhering to strict environmental regulations and performance standards.

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Market Driver

The rapid uptake of electric and hybrid vehicles is fundamentally reshaping the industry by necessitating a swift shift toward electric pump architectures. Unlike traditional internal combustion engines that use belt-driven mechanical pumps, modern electric platforms depend on independent electric water and oil pumps to handle the critical thermal management of batteries, inverters, and motors. This structural evolution is fueled by the surging demand for electrified transportation, compelling manufacturers to adapt production lines for high-voltage components. According to the International Energy Agency's 'Global EV Outlook 2024' from April 2024, sales of electric cars approached 14 million units in 2023, representing a massive new revenue opportunity for suppliers capable of delivering efficient, electronically controlled pumping solutions.

Simultaneously, strict emission and fuel economy regulations are driving the integration of smart, variable displacement pump systems within the hybrid and internal combustion sectors. To reduce carbon footprints, automakers are minimizing parasitic engine losses by replacing standard fixed-displacement pumps with advanced on-demand systems that optimize fluid flow based on real-time conditions. The market's response is evident in the growing prominence of hybrid technologies utilizing these components to maintain compliance; the European Automobile Manufacturers? Association noted in January 2024 that hybrid-electric cars secured a 25.8% market share in the European Union in 2023. Reflecting the financial scale of this demand, BorgWarner Inc. reported full-year net sales of 14.2 billion dollars in their February 2024 report, driven significantly by their air and fluid management technologies.

Market Challenge

The volatility of raw material costs stands as a formidable barrier to the expansion of the Global Automotive Pumps Market. Manufacturers rely heavily on aluminum, steel, and electronic components, meaning that erratic price fluctuations in these inputs create an unpredictable operating environment. When material prices spike, pump manufacturers face a difficult choice between absorbing the additional expenses, which erodes profit margins, or passing them onto vehicle manufacturers, potentially reducing their competitiveness. This financial instability directly hampers the ability of suppliers to invest in the research and development required for the specialized electric pumps needed for vehicle electrification.

Consequently, this economic pressure stalls strategic growth and complicates long-term

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planning for component manufacturers. The impact of these cost dynamics is visible in recent industry performance metrics regarding supplier health. According to the European Association of Automotive Suppliers (CLEPA), in 2024, 38% of automotive suppliers anticipated operating at marginal or negative profitability levels due to unrelenting cost pressures and market instability. Such financial strain limits the capital available for expanding production capacities and meeting the stringent performance standards demanded by modern automotive architectures.

Market Trends

The increasing implementation of high-pressure gasoline direct injection (GDI) pumps has become a dominant trend as automakers seek to optimize internal combustion engine efficiency to meet tightening particulate emission standards. Unlike traditional port fuel injection, GDI systems require specialized pumps capable of generating immense pressure to atomize fuel directly within the combustion chamber, thereby enhancing combustion stability and reducing exhaust particulates. This technology is essential for engine downsizing efforts without sacrificing performance, serving as a critical strategy for bridging the gap to full electrification. According to the U.S. Department of Energy's 'Fact of the Week 1331' from February 2024, GDI technology reached a market share of 73% of all light-duty vehicles produced for the 2023 model year, highlighting its entrenched status in modern powertrain architectures.

Simultaneously, there is a distinct emergence of auxiliary electric pumps tailored for hybrid transmission systems, which operate independently of the internal combustion engine. These pumps are critical for maintaining hydraulic pressure and lubrication in the electric drive modules of hybrid vehicles during start-stop events or coasting modes when the mechanical engine is inactive. This application differs significantly from thermal management, focusing instead on protecting transmission components and ensuring seamless gear shifts in electrified powertrains. Reflecting this demand, Rheinmetall AG announced in a March 2024 press release that it had secured a contract worth a lower-three-digit million-euro figure to supply electric oil pumps specifically for a global automaker's hybrid vehicle platforms.

Key Market Players

JTEKT Corporation

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Aisin Corporation

HELLA GmbH & Co. KGaA

Concentric AB

TI Fluid Systems plc

Continental AG

SHW AG

Phinia Inc.

Pricol Limited

Report Scope

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

Automotive Pumps Market, By Product

Fuel Pump

Oil Pump

Steering Pump

Water Pump

Fuel Injection Pump

Others

Automotive Pumps Market, By Technology

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India

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 Automotive Pumps Market.

Available Customizations:

Global Automotive 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

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

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