

Passenger Cars Hydraulic Systems Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application Type (Brake, Clutch, Suspension), By Component Type (Master Cylinder, Slave Cylinder, Reservoir, Hose), By End User (OEM, Aftermarket), By Region, Competition, 2018-2028

<https://marketpublishers.com/r/P957DCC19975EN.html>

Date: October 2023

Pages: 183

Price: US\$ 4,900.00 (Single User License)

ID: P957DCC19975EN

Abstracts

Global Passenger Cars Hydraulic Systems Market has valued at USD 3.5 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.30% through 2028. A transmission system that drives a mechanical system using pressurized hydraulic fluid is a component of the automotive hydraulic system. Because of the pressure difference between two places, the hydraulic system thus relies on the transfer of energy. In contrast to the conventional mechanical system, which depends on the movement of kinetic energy to function, this is significantly different. Since traditional mechanical drive systems might lose effectiveness over time due to friction, hydraulic systems are thought to be more accurate than those older mechanical drive systems. The need for commercial vehicles is anticipated to rise in response to the expansion of the industrial sector, the tourism industry, and the logistics industry, which will also likely result in a rise in the need for hydraulic systems.

Key Market Drivers

Safety and Performance Requirements

One of the primary drivers for the Global Passenger Cars Hydraulic Systems Market is the stringent safety and performance requirements imposed by both consumers and

regulatory bodies. Hydraulic systems have a long-standing reputation for delivering reliable and consistent performance in critical automotive functions such as braking and steering. These systems are known for their ability to provide precise control, which is crucial for ensuring passenger safety. Automakers are under constant pressure to meet or exceed safety standards, and hydraulic systems have been a dependable choice to achieve this goal. Hydraulic brakes, for example, offer excellent stopping power and can handle high loads, contributing to shorter stopping distances and improved safety. Likewise, hydraulic power steering systems provide the necessary assistive force for vehicle maneuverability. Additionally, consumers continue to prioritize safety in their vehicle purchases, further driving the demand for hydraulic systems that are well-established in terms of performance and reliability.

Versatility and Durability

Hydraulic systems offer versatility and durability, making them a vital driver in the passenger car market. These systems are not limited to just one application but are used in various components within vehicles. Hydraulic systems find use in power steering, braking, suspension systems, and convertible roof mechanisms, among others. The versatility of hydraulic systems allows automakers to implement them in different parts of the vehicle, catering to specific performance needs. For example, adjustable hydraulic suspensions can provide a smooth and comfortable ride, while hydraulic brakes can handle heavy loads in larger vehicles like SUVs and trucks. Moreover, hydraulic systems are known for their robustness and durability. They can withstand harsh conditions and are less prone to wear and tear compared to some electronic alternatives. This durability is a key driver for automakers looking to ensure the longevity of their vehicles and reduce maintenance costs.

Cost-Effectiveness for Certain Applications

While electronic systems have gained prominence in various automotive functions, hydraulic systems remain cost-effective for specific applications. This cost-effectiveness is a significant driver for the Global Passenger Cars Hydraulic Systems Market. Hydraulic components are often less expensive to manufacture and install compared to their electronic counterparts. For instance, hydraulic power steering systems are still widely used because they offer a cost-effective solution for smaller and mid-sized vehicles, where precise steering control is necessary but electronic systems might be over-engineered. Similarly, hydraulic braking systems are economical and provide adequate stopping power for compact and budget-friendly vehicles. Automakers, especially those catering to price-sensitive markets, continue to choose hydraulic

systems for certain functions to maintain competitive pricing while meeting performance requirements.

Aftermarket Demand and Retrofits

The demand for aftermarket hydraulic system components and retrofits is a notable driver for the Global Passenger Cars Hydraulic Systems Market. Many car enthusiasts and vehicle owners seek to enhance the performance of their vehicles or customize their ride. This often involves retrofitting hydraulic systems, particularly in older vehicles or classic cars. Hydraulic suspensions, for instance, are popular among enthusiasts who want to achieve a customized look and feel for their vehicles. By installing adjustable hydraulic suspensions, owners can lower or raise their cars for improved aesthetics or better handling. Similarly, hydraulic power steering systems are sought after for retrofitting in vintage cars to maintain their original charm while ensuring drivability. The aftermarket demand for hydraulic components and retrofits keeps this market segment thriving, as automotive enthusiasts and restoration projects continue to seek hydraulic solutions to meet their specific needs.

Key Market Challenges

Increasing Electrification of Passenger Cars

One of the significant challenges facing the Global Passenger Cars Hydraulic Systems Market is the increasing electrification of passenger cars. As governments around the world push for stricter emissions standards and consumers demand more environmentally friendly vehicles, automakers are investing heavily in electric vehicles (EVs). Electric vehicles rely on electric motors and batteries instead of traditional internal combustion engines, rendering many hydraulic systems obsolete. Hydraulic systems have been widely used in traditional internal combustion engine vehicles for power steering, braking, and suspension systems. However, electric vehicles use electric power steering, regenerative braking, and often have air suspension systems, reducing the need for hydraulic components. This shift in technology threatens the demand for hydraulic systems in the passenger car market, creating a significant challenge for hydraulic system manufacturers.

Advancements in Electronic Systems

Advancements in electronic systems pose another challenge to the Global Passenger Cars Hydraulic Systems Market. Modern vehicles are becoming increasingly reliant on

electronic control systems to manage various functions, including braking, steering, and suspension. Electronic stability control, advanced driver-assistance systems (ADAS), and even autonomous driving technology require sophisticated electronic components and sensors. These electronic systems can often provide more precise control and better performance than traditional hydraulic systems. For instance, electronic stability control systems can apply individual brakes to specific wheels, allowing for superior handling and safety. As electronic systems continue to evolve and become more cost-effective, automakers are inclined to adopt them over hydraulic alternatives, leading to decreased demand for hydraulic components.

Environmental Regulations and Sustainability

Environmental regulations and sustainability concerns represent a significant challenge for the Global Passenger Cars Hydraulic Systems Market. Governments worldwide are imposing stricter emissions and fuel efficiency standards to combat climate change and reduce pollution. As a result, automakers are striving to make vehicles more fuel-efficient and eco-friendlier. Hydraulic systems in passenger cars can be less energy-efficient compared to electronic alternatives, as they rely on hydraulic fluid and pumps that can consume more power. Additionally, hydraulic fluids can pose environmental hazards if they leak or are not properly disposed of. As automakers work to meet stringent environmental regulations and consumers become more environmentally conscious, there is a growing preference for sustainable, energy-efficient, and clean technologies, further limiting the prospects of hydraulic systems in passenger cars.

Cost Pressures and Price Sensitivity

Cost pressures and price sensitivity among consumers are challenges that significantly impact the Global Passenger Cars Hydraulic Systems Market. Hydraulic systems can be relatively expensive to manufacture and install compared to electronic alternatives. As a result, automakers face pressure to reduce costs while maintaining or improving vehicle performance. Consumers are also price-sensitive, often choosing vehicles based on affordability and operating costs. The higher initial cost of hydraulic systems, coupled with their potentially higher maintenance requirements, can deter budget-conscious buyers. This price sensitivity can lead automakers to favor electronic systems that may offer similar or better performance at a lower cost.

Technological Transition and Adaptation

The technological transition and adaptation challenge are closely related to the previous

challenges mentioned. Transitioning from traditional hydraulic systems to more advanced electronic alternatives is not a seamless process. Automakers and hydraulic system manufacturers must invest in research and development to adapt to new technologies and remain competitive. Furthermore, there's a learning curve associated with implementing and maintaining electronic systems, which requires specialized knowledge and training. As automakers make this transition, they face the challenge of ensuring their workforce is skilled in handling these advanced technologies. Additionally, suppliers in the hydraulic systems market need to diversify their product offerings or find ways to integrate with electronic systems to stay relevant in the changing automotive landscape.

Key Market Trends

Electrification of Hydraulics

One prominent trend in the Global Passenger Cars Hydraulic Systems Market is the increasing electrification of hydraulic systems. Traditionally, hydraulic systems rely on mechanical and hydraulic components to function, but advancements in technology are leading to the integration of electric components to enhance efficiency and control. This trend aligns with the broader shift toward electric vehicles (EVs) and the demand for more eco-friendly, energy-efficient systems. Electrification of hydraulic systems involves the use of electric pumps, sensors, and actuators to replace traditional mechanical and hydraulic components. Electrically assisted hydraulic steering, for example, offers finer control and can be seamlessly integrated with advanced driver-assistance systems (ADAS). Similarly, electrically controlled hydraulic brakes can provide regenerative braking capabilities, improving overall vehicle efficiency. This trend is driven by the desire to reduce energy consumption, enhance controllability, and align hydraulic systems with the electrified future of the automotive industry. It allows manufacturers to combine the benefits of hydraulics, such as power and reliability, with the precision and adaptability of electronic systems.

Integration with Advanced Driver-Assistance Systems (ADAS)

The integration of hydraulic systems with Advanced Driver-Assistance Systems (ADAS) is another significant trend in the market. ADAS includes features like adaptive cruise control, lane-keeping assistance, and automatic emergency braking, all of which rely on precise control of various vehicle functions. Hydraulic systems play a crucial role in enabling these features by providing the necessary control over steering, braking, and suspension systems. For example, hydraulic power steering systems with electronic

control can work in tandem with ADAS to provide more responsive and adaptive steering assistance. Hydraulic brakes with electronic sensors can optimize braking performance based on real-time data from ADAS sensors. Furthermore, hydraulic suspensions can adjust ride height and damping to enhance stability and comfort during ADAS interventions. As the demand for safer and more automated driving experiences grows, the integration of hydraulic systems with ADAS continues to gain momentum. This trend ensures that hydraulic systems remain relevant and compatible with the latest vehicle safety and automation technologies.

Lightweight Hydraulic Components

In response to the industry-wide focus on fuel efficiency and emissions reduction, a trend towards lightweight hydraulic components is emerging in the Global Passenger Cars Hydraulic Systems Market. Weight reduction is crucial for improving vehicle efficiency and reducing carbon emissions, and automakers are actively seeking ways to make vehicles lighter without compromising safety or performance. Lightweight hydraulic components involve the use of advanced materials, such as composite materials and lightweight alloys, in the manufacturing of hydraulic parts like pumps, cylinders, and hoses. These components are designed to maintain their structural integrity while being significantly lighter than their traditional counterparts. For example, lightweight hydraulic hoses and connectors reduce the overall weight of hydraulic systems, which can contribute to fuel savings and reduce the environmental impact of vehicles. Additionally, lighter hydraulic components can improve handling and maneuverability, enhancing the overall driving experience. This trend aligns with the industry's commitment to sustainability and meeting stringent fuel efficiency standards, and it underscores the importance of developing hydraulic systems that are both efficient and environmentally friendly.

Enhanced Diagnostics and Predictive Maintenance

The adoption of enhanced diagnostics and predictive maintenance capabilities in hydraulic systems is becoming increasingly prevalent in the market. Modern vehicles are equipped with numerous sensors and data-sharing capabilities, which can be leveraged to monitor the health and performance of hydraulic components in real-time. Advanced diagnostic systems can detect abnormalities or wear and tear in hydraulic systems, enabling early detection of potential issues. This not only helps in preventing costly breakdowns but also contributes to vehicle safety. Predictive maintenance algorithms use the collected data to predict when maintenance or replacement of hydraulic components will be required, optimizing maintenance schedules and

minimizing downtime. Moreover, these diagnostic and predictive maintenance features are integrated into the broader vehicle telematics and connectivity systems, allowing vehicle owners and manufacturers to monitor the health of hydraulic systems remotely. This trend aligns with the growing demand for connected vehicles and the desire for hassle-free ownership experiences.

Sustainable Hydraulic Fluids

As sustainability becomes a key focus for the automotive industry, the adoption of sustainable hydraulic fluids is a noteworthy trend in the Global Passenger Cars Hydraulic Systems Market. Traditional hydraulic systems rely on hydraulic fluids that can have negative environmental impacts if they leak or are not properly disposed of. To address these concerns, manufacturers are exploring eco-friendly and biodegradable hydraulic fluids that are less harmful to the environment. Sustainable hydraulic fluids are designed to provide the necessary lubrication and pressure transmission functions while minimizing their ecological footprint. This trend aligns with the broader shift toward sustainable practices and environmental responsibility in the automotive industry. Automakers and hydraulic system manufacturers are investing in research and development to formulate hydraulic fluids that meet performance requirements while adhering to strict environmental standards.

Segmental Insights

Application Type Analysis

Brake, clutch, and suspension are among the market segments for Automotive Hydraulics Systems based on application. In terms of application, the braking category will use this system the most frequently. This is due to suspension systems' history of successfully integrating hydraulic systems. However, there have been some positive developments in brake technology, with hydraulic braking currently being the most practical choice.

Component Type Analysis

Reservoir, hose, master cylinder, and slave cylinder are among the components that make up the reservoir section of the automotive hydraulics system market. The slave cylinder market segment dominated the automotive hydraulics systems industry in 2022. The hydraulic system will most often be used by the slave cylinder. This is a result of the slave cylinder's numerous applications, which include the clutch, gear

mechanism, and disc brake systems, where it transforms mechanical pressure into the appropriate hydraulic pressure used on the disc brake pads.

End User Analysis

The Automotive Hydraulics System market is segmented into OEM and aftermarket based on the end user. Automotive hydraulics systems' total market was led in 2022 by the OEM category. OEM and aftermarket have the same potential for growth as aftermarket due to the steady growth of the global auto industry and technical advancements in after-sales services.

Regional Insights

The Asia-Pacific region is predicted to experience greater growth in the market under study during the forecast. The largest auto market worldwide is in China. The country's demand for vehicles has grown because of China's expanding economy and rising disposable incomes of its citizens. Furthermore, China's low production costs have aided in the country's expansion as a leader in the automobile industry. By 2020, China is expected to have sold 5.1 million commercial vehicles, up from 4.3 million in 2018. Due to the presence of China and Japan, which together make up the largest markets for electric vehicles and most manufacturers advancing the technology behind them, the Asia-Pacific region had a high penetration rate of electrification.

In the market for automobile hydraulics systems, Asia-Pacific is experiencing significant growth. Due to the prominence of governmental regulations pertaining to the active and passive safety of automobiles, the Asia-Pacific region now dominates the market for automotive hydraulics systems and will do so during the projection period. The increased demand for vehicles and individual disposable income are two additional factors boosting the market growth rate. A high growth rate is anticipated for North America throughout the projected period because of rising building activity investment.

Key Market Players

Aisin Seiki Co. Lid

Robert Bosch GmbH

ZF Group

Warner Electric LLC

Continental AG

Schaeffler Group

WABCO

GKN PLC

JTEKT Corporation

Fte Automotive

Report Scope:

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

Passenger Cars Hydraulic Systems Market, By Application Type:

Brake

Clutch

Suspension

Passenger Cars Hydraulic Systems Market, By Component Type:

Master Cylinder

Slave Cylinder

Reservoir

Hose

Passenger Cars Hydraulic Systems Market, By End User:

OEM

Aftermarket

Passenger Cars Hydraulic Systems 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 Passenger Cars Hydraulic Systems Market.

Available Customizations:

Global Passenger Cars Hydraulic Systems 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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