

# Asia Pacific Back of Cab Market Size and Forecast (2021 - 2031)

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## Abstracts

The Asia Pacific Back of Cab Market is projected to grow significantly, reaching an estimated US\$ 325.0 million by 2031, up from US\$ 206.0 million in 2024. This growth represents a compound annual growth rate (CAGR) of 7.0% from 2025 to 2031, driven by various factors influencing the heavy commercial vehicle sector across the region.

### Executive Summary and Market Analysis

The back of cab market in the Asia Pacific region is divided into several key countries, including China, India, Japan, Australia, South Korea, and other parts of the Asia Pacific. The rapid pace of industrialization, the expansion of road networks, and the increasing demand for freight transport are contributing to a surge in vehicle ownership, particularly in countries like China and India, as well as in Southeast Asia. These regions often require long-distance travel where refueling infrastructure is limited, prompting fleets to adopt auxiliary fuel capacity solutions, such as additional fuel tanks installed behind the cab, to ensure reliable route completion.

Governments in the Asia Pacific are implementing stricter emission regulations and fuel economy standards, alongside incentives for alternative fuels like LNG and CNG. For example, in China, the adoption of LNG-fueled trucks has increased significantly due to government subsidies, lower LNG prices, and stringent diesel emission regulations. This trend is driving demand for advanced back of cab systems designed to accommodate these alternative fuels. In India, the expansion of highways and intercity freight routes emphasizes the need for vehicles with enhanced fuel capacity and long-range capabilities. Additionally, there is a growing aftermarket opportunity for retrofitting existing fleet vehicles with auxiliary systems to improve fuel capacity or transition to alternative fuels. Improvements in the supply chain, including local production of tanks

and components, are also contributing to market growth by reducing costs and addressing the challenges posed by aging fueling stations.

## **Strategic Insights**

### **Market Segmentation**

The Asia Pacific Back of Cab Market can be segmented by vehicle type, application, and fuel tank type:

**By Vehicle Type:** The market is categorized into Light-duty, Medium-duty, and Heavy-duty Commercial Vehicles, with the Heavy-duty segment leading the market in 2024.

**By Application:** The market is divided into Fuel Tanks and General Storage, with the Fuel Tanks segment holding the largest share in 2024.

**By Fuel Tank Type:** The market is further segmented into CNG and Hydrogen, where the CNG segment dominated in 2024.

The increasing demand for modular and customized back of cab systems presents significant growth opportunities. Industries are increasingly seeking tailored solutions to meet specific operational needs, moving away from traditional one-size-fits-all designs. Modular systems that can be customized based on truck type, application, and user requirements are becoming more prevalent. These systems typically include components such as battery boxes, fuel tanks, aftertreatment systems, air tanks, and auxiliary power units, which must be integrated effectively to optimize space and functionality.

As industries such as logistics, construction, mining, and long-haul transportation expand, the need for adaptable back of cab solutions has intensified. For instance, electric and hybrid trucks may require specialized thermal management systems, while heavy-duty trucks may need enhanced storage capacity or reinforced structures. This customization ensures optimal performance under varying load, climate, and route conditions, prompting manufacturers to develop innovative back of cab systems. Key players in the market, including Hexagon Agility, Cummins Clean Fuel Technologies, and Custom Vehicle Solutions, are focusing on creating custom and modular solutions to meet the evolving demands of fleet operators.

The shift towards modularity also facilitates faster assembly and easier maintenance, which are crucial for fleet operators aiming to minimize downtime and reduce operational costs. As global regulations on emissions and vehicle efficiency tighten, both OEMs and fleet managers are increasingly turning to customized solutions that comply with these standards without sacrificing vehicle performance or load capacity. This trend opens up lucrative opportunities for back of cab manufacturers and suppliers to offer value-added, application-specific products that enhance operational efficiency and extend vehicle lifespan, thereby driving long-term market growth.

## **Country Insights**

The Asia Pacific Back of Cab Market is further segmented by country, with significant contributions from India, China, Japan, South Korea, Australia, and the rest of the Asia Pacific. China is expected to hold the largest market share in 2024, driven by its rapidly growing heavy trucking and freight sectors. The Chinese government's push for lower-emission alternatives has spurred demand for back of cab fuel systems, particularly as LNG-fueled trucking gains traction due to subsidies and emissions standards. The development of LNG and CNG refueling infrastructure in China alleviates concerns about range, further promoting the installation of back of cab systems. Additionally, as China advances in hydrogen fuel cell vehicle technology and infrastructure, the relevance of back of cab hydrogen storage systems for specialized heavy-duty vehicles is increasing. The tightening of air quality and CO<sub>2</sub> emission regulations is making high-capacity, compliant back of cab systems increasingly popular among fleet operators.

## **Company Profiles**

Key players in the Asia Pacific Back of Cab Market include Cummins Inc., PACCAR Inc., INOX India Limited, Hexagon Composites ASA, Quantum Fuel Systems, Worthington Enterprises, T.L. Wood's, ProTech, American Truckboxes, LLC, and SMTR Group. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

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