

Europe Back of Cab Market Size and Forecast (2021 - 2031)

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Abstracts

The Europe Back of Cab Market is projected to grow significantly, reaching an estimated US\$ 357.3 million by 2031, up from US\$ 240.4 million in 2024. This growth represents a compound annual growth rate (CAGR) of 6.0% from 2025 to 2031.

Executive Summary and Market Analysis

Key countries contributing to the growth of the Europe back of cab market include Germany, France, the UK, and Italy. The demand for back of cab systems has surged, primarily driven by the increasing needs of the heavy commercial and regional logistics sectors. The region's stringent regulatory framework regarding emissions, such as the Euro VI standards and upcoming stricter CO2 limits for trucks, along with mandates for alternative fuels, are pushing fleets to adopt alternative fuel strategies. The adoption of liquefied natural gas (LNG) in specific heavy-duty trucking corridors is on the rise, necessitating specialized storage and delivery systems, including auxiliary tanks positioned behind the vehicle or on the chassis to complement main tanks.

Additionally, fuel cell trucks and those powered by gas or hydrogen are being trialed in various countries. These vehicles may require additional storage or delivery subsystems located in non-standard positions for safety, cooling, or refueling infrastructure reasons. The focus on lower-emission logistics across borders within the EU is increasing the demand for enhanced fuel capacity and redundancy. Furthermore, advancements in technology, such as lighter composite tanks, improved thermal insulation, and modular auxiliary fuel packs, alongside the rising electrification and deployment of hydrogen and fuel-cell technologies, may reduce reliance on traditional fuel systems in the long term. Consequently, the demand for heavy-duty and alternative fuel trucks is encouraging fleet operators to install back of cab systems to improve driver comfort and enhance fuel

efficiency, thereby propelling market growth.

Strategic Insights

Market Segmentation Analysis

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

By Vehicle Type: The market is divided into Light-duty Commercial Vehicles, Medium-duty Commercial Vehicles, and Heavy-duty Commercial Vehicles. The Heavy-duty Commercial Vehicles segment is expected to dominate the market in 2024.

By Application: The market is categorized into Fuel Tanks and General Storage, with the Fuel Tanks segment leading in 2024.

By Fuel Tank: The market is further segmented into CNG and Hydrogen, where the CNG segment is anticipated to dominate in 2024.

Market Outlook

The burgeoning freight transportation industry, driven by the rapid growth of logistics and trucking sectors, has significantly increased the demand for specialized cab accessories, particularly back of cab systems. According to statistics from the International Transport Forum, road transport saw a 0.3% increase in 2024 compared to 2023. This rise in road transportation activities has led to a greater integration of back of cab systems among fleet operators. These systems, which include modular storage solutions, toolboxes, and cargo management racks, are becoming essential for fleet operators aiming to enhance operational efficiency and vehicle utility.

The surge in e-commerce and last-mile delivery services has been a crucial driver of market growth. As online shopping becomes increasingly popular, logistics firms face pressure to optimize their delivery operations. Back of cab systems provide solutions that enhance load capacity, organization, real-time tracking, driver safety, route planning, and communication between drivers and dispatchers, leading to shorter delivery times and improved customer satisfaction. These systems also enhance tracking, security, and convenience, aligning with the growing emphasis on smart

technologies within the logistics ecosystem. Thus, the expanding e-commerce landscape is driving the adoption and innovation of back-of-cab technologies, addressing the complexities of modern last-mile logistics.

Country Insights

The Europe Back of Cab Market is segmented by country, including France, Germany, the United Kingdom, Italy, Russia, and the Rest of Europe. Germany is expected to hold the largest market share in 2024.

In Germany, the demand for back of cab systems is increasing due to tightening emission regulations (Euro 6/Euro 7), efficiency pressures in freight transport, and the expansion of the logistics sector. German truck fleets, particularly those operating long routes (especially cross-border into Eastern Europe or Scandinavia), require auxiliary tanks to improve uptime, reduce fuel stops, and lower operational costs. Regulations favoring cleaner-burning fuels also necessitate the design of efficient fuel delivery and return systems. Moreover, Germany's engineering expertise supports innovations in materials, such as lighter tanks, and aids manufacturers in developing advanced sensor-monitored fuel usage systems. The demand for back of cab systems is further bolstered by environmental compliance incentives and the volatility of fuel costs, compelling fleet operators to optimize fuel carrying and usage.

Company Profiles

Key players in the Europe 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, including expansion, product innovation, and mergers and acquisitions, to deliver innovative products to consumers and enhance their market share.

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