

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

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Abstracts

The North America Back of Cab Market is projected to grow significantly, reaching an estimated US\$ 636.5 million by 2031, up from US\$ 412.0 million in 2024. This growth represents a compound annual growth rate (CAGR) of 6.6% from 2025 to 2031.

Executive Summary and Market Analysis

The back of cab market in North America is divided into three primary regions: the United States, Canada, and Mexico. The demand for back of cab systems is increasingly influenced by the heavy-duty trucking sector's need for extended range, operational flexibility, and adherence to stricter emission regulations. Given the long-haul distances typical in the US and Canada, trucks often require substantial fuel reserves. Positioning fuel storage behind the cab—whether through double-tank setups or auxiliary tanks—facilitates better weight distribution, allows for longer travel without interruptions, and meets range requirements in less populated areas.

Regulatory pressures from agencies like the Environmental Protection Agency (EPA) and various state mandates, such as California's low nitrogen oxide (NOx), low sulfur, and low carbon fuel regulations, are driving the adoption of alternative fuels, including liquefied natural gas (LNG), compressed natural gas (CNG), and biodiesel blends. This shift necessitates specialized fuel delivery systems that can be integrated into the back of vehicles. The rise of CNG and LNG in fleet applications further emphasizes the need for tanks that can be mounted in non-traditional locations, such as behind the cab.

As the logistics and transportation industry expands, long-distance carriers are increasingly focused on reducing costs by minimizing downtime, which in turn boosts the installation of back of cab systems to decrease refueling frequency. Technological

advancements in materials—such as lighter tanks with improved sealing and corrosion resistance—and fuel delivery technologies, including enhanced pumps, sensors, and filtration systems, are also contributing to market growth. Additionally, the back of cab market in North America is experiencing significant growth due to the rising demand for heavy commercial vehicles and fleet operators' emphasis on fuel efficiency.

Strategic Insights

Market Segmentation Analysis

The North America 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 Commercial Vehicles, Medium-duty Commercial Vehicles, and Heavy-duty Commercial Vehicles, with the Heavy-duty Commercial Vehicles segment leading the market in 2024.

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

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

Market Outlook

The global commercial transportation industry is increasingly focused on improving fuel efficiency due to stringent environmental regulations, rising fuel costs, and a growing consumer demand for greener vehicles. This drive for enhanced fuel economy has led to significant innovations in vehicle design and engineering, particularly concerning fuel systems. As governments worldwide implement stricter emissions regulations and consumers become more environmentally conscious, automotive manufacturers are compelled to innovate and optimize their vehicle fuel systems. Improved fuel efficiency not only reduces operational costs but also aligns with global efforts to minimize carbon footprints and enhance sustainability.

Back of cab fuel systems are emerging as a strategic solution within the automotive industry, especially for commercial vehicles like trucks and heavy-duty machinery. For

example, in July 2025, Hexagon Agility received an order to supply fuel systems for X15N natural gas-powered trucks for a major American consumer goods company. This order underscores the growing adoption of alternative fuel systems in the commercial transportation sector. By positioning fuel tanks behind the cab, manufacturers can optimize space utilization and improve weight distribution, which directly contributes to better fuel economy. This configuration also allows for more aerodynamic vehicle designs, reducing drag and lowering fuel consumption. Furthermore, these setups facilitate the integration of advanced fuel management technologies, including multi-tank systems and enhanced fuel delivery mechanisms, which improve fuel efficiency and operational reliability.

Country Insights

The North America Back of Cab Market is segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The demand for back of cab systems in the US is driven by stringent emissions regulations, rising fuel costs, and a strong push for alternative fuels such as CNG and renewable natural gas (RNG). Major manufacturers, including Cummins and Quantum Fuel Systems, have introduced back of cab CNG/RNG systems that are lighter, more aerodynamic, and easier to service. Long-haul trucking fleets, which travel extensive distances daily, benefit from back of cab systems by extending their range without overloading side tanks or compromising payload capacity. Additionally, federal and state incentive programs for clean fuel vehicles, along with tightening fuel economy and greenhouse gas regulations, encourage fleet operators to adopt back of cab systems to accommodate natural gas or renewable gas.

Company Profiles

Key players in the North America 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 and enhance their market presence.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. BACK OF CAB MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
- 4.3 Ecosystem Analysis
 - 4.3.1 Original Equipment Manufacturers (OEMs)
 - 4.3.2 Distributors or Suppliers
 - 4.3.3 End-Use Industry
 - 4.3.4 List of Vendors in the Value Chain

5. NORTH AMERICA BACK OF CAB MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. BACK OF CAB MARKET - NORTH AMERICA MARKET ANALYSIS

6.1 North America Back of Cab Market Revenue (US\$ Million), 2024 - 2031

6.2 North America Back of Cab Market Forecast and Analysis

7. NORTH AMERICA BACK OF CAB MARKET REVENUE ANALYSIS - BY VEHICLE TYPE

7.1 Light-duty Commercial Vehicles

7.1.1 Overview

7.1.2 Light-duty Commercial Vehicles: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Medium-duty Commercial Vehicles

7.2.1 Overview

7.2.2 Medium-duty Commercial Vehicles: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 Heavy-duty Commercial Vehicles

7.3.1 Overview

7.3.2 Heavy-duty Commercial Vehicles: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. NORTH AMERICA BACK OF CAB MARKET REVENUE ANALYSIS - BY APPLICATION

8.1 Fuel Tanks

8.1.1 Overview

8.1.2 Fuel Tanks: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 General Storage

8.2.1 Overview

8.2.2 General Storage: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. NORTH AMERICA BACK OF CAB MARKET REVENUE ANALYSIS - BY FUEL TANK

9.1 CNG

9.1.1 Overview

9.1.2 CNG: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Hydrogen

9.2.1 Overview

9.2.2 Hydrogen: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. NORTH AMERICA BACK OF CAB MARKET - COUNTRY ANALYSIS

10.1 North America

10.1.1 North America Back of Cab Market Revenue and Forecast and Analysis - by Country

10.1.1.1 North America Back of Cab Market Revenue and Forecast and Analysis - by Country

10.1.2.2 United States: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.1.2.2.1 United States: North America Back of Cab Market Share - by Vehicle Type

10.1.2.2.2 United States: North America Back of Cab Market Share - by Application

10.1.2.2.3 United States: North America Back of Cab Market Share - by Fuel Tank

10.2.3.3 Canada: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2.3.3.1 Canada: North America Back of Cab Market Share - by Vehicle Type

10.2.3.3.2 Canada: North America Back of Cab Market Share - by Application

10.2.3.3.3 Canada: North America Back of Cab Market Share - by Fuel Tank

10.3.4.4 Mexico: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3.4.4.1 Mexico: North America Back of Cab Market Share - by Vehicle Type

10.3.4.4.2 Mexico: North America Back of Cab Market Share - by Application

10.3.4.4.3 Mexico: North America Back of Cab Market Share - by Fuel Tank

11 COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Market Share Analysis, 2024

12 INDUSTRY LANDSCAPE

12.1 Overview

- 12.2 New Product Development
- 12.3 Merger and Acquisition
- 12.4 Other Strategic Developments

13 COMPANY PROFILES

13.1 Cummins Inc

- 13.1.1 Key Facts
- 13.1.2 Business Description
- 13.1.3 Products and Services
- 13.1.4 Financial Overview
- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments

13.2 PACCAR Inc

- 13.2.1 Key Facts
- 13.2.2 Business Description
- 13.2.3 Products and Services
- 13.2.4 Financial Overview
- 13.2.5 SWOT Analysis
- 13.2.6 Key Developments

13.3 INOX India Limited

- 13.3.1 Key Facts
- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments

13.4 Hexagon Composites ASA

- 13.4.1 Key Facts
- 13.4.2 Business Description
- 13.4.3 Products and Services
- 13.4.4 Financial Overview
- 13.4.5 SWOT Analysis
- 13.4.6 Key Developments

13.5 Quantum Fuel Systems

- 13.5.1 Key Facts
- 13.5.2 Business Description
- 13.5.3 Products and Services
- 13.5.4 Financial Overview

- 13.5.5 SWOT Analysis
- 13.5.6 Key Developments
- 13.6 Worthington Enterprises
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 T.L. Wood's
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 ProTech
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 American Truckboxes, LLC
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 SMTR Group
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments

14. APPENDIX

14.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. North America Back of Cab Market Segmentation

Table 2. List of Vendors

Table 3. North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Vehicle Type

Table 5. North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 6. North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fuel Tank

Table 7. North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 8. United States: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Vehicle Type

Table 9. United States: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 10. United States: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fuel Tank

Table 11. Canada: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Vehicle Type

Table 12. Canada: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 13. Canada: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fuel Tank

Table 14. Mexico: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Vehicle Type

Table 15. Mexico: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 16. Mexico: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Fuel Tank

Table 17. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. North America Back of Cab Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: Back of Cab Market

Figure 4. North America Back of Cab Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. North America Back of Cab Market Revenue (US\$ Million), 2024 - 2031

Figure 7. North America Back of Cab Market Share (%) - by Vehicle Type, 2024 and 2031

Figure 8. Light-duty Commercial Vehicles: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Medium-duty Commercial Vehicles: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Heavy-duty Commercial Vehicles: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. North America Back of Cab Market Share (%) - by Application, 2024 and 2031

Figure 12. Fuel Tanks: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 13. General Storage: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. North America Back of Cab Market Share (%) - by Fuel Tank, 2024 and 2031

Figure 15. CNG: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Hydrogen: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. North America Back of Cab Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 18. United States: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Canada: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Mexico: North America Back of Cab Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Company Market Share Analysis, 2024

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