

# **Automotive 48V System Market by Architecture (Belt Driven, Crankshaft Mounted, Dual-Clutch Transmission-Mounted, and Transmission Output Shaft) and Vehicle Class (Entry, Mid, Premium, and Luxury): Global Opportunity Analysis and Industry Forecast, 2020–2027**

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## **Abstracts**

The 48V system range is effective, regardless of capping voltages below a 60V cut-off, as they meet Safety-Extra Low-Voltage (SELV) requirements. 48V can distribute power to commercial EV components, minimizing copper losses without causing unsafe SELV issues. 48-volt battery and system supply power to the hybrid motor and super-charger to launch the vehicle faster and smoother, eliminating turbo lag. It also supports heavier electrical load items such as air conditioning. The 12-volt battery and system are enhanced from the 48-volt system via a hybrid generator, inverters, and DC/DC converter. This keeps the 12-volt battery charged and thermally managed, allowing it to provide the power needed for active safety and infotainment features. Moreover, the 48V architectures provide the optimal trade-off of meeting regulations, performance, weight, and cost. The automotive 48V system market is segmented on the basis of architecture, vehicle class, component, and region.

Automakers worldwide are moving toward electrifying their fleets, but it does not mean every future car or truck will need to be plugged in. Instead, the first wave of this advancement is 48-volt technology. This new technology includes the benefits of decreased emissions and even improved acceleration. And the new onboard battery systems provide extra power to run infotainment and advanced safety systems in vehicle.

Moreover, the 48-volt systems are an easy way for automakers to improve performance, fuel economy, and even durability. Most cars today contain the typical 12-volt electrical system that relies on an alternator to convert the engine's power into electrical current. That current charges the vehicle's starter battery and runs all the vehicle's electrical components, including lighting, infotainment, and safety systems. But 12-volt systems are becoming inadequate for modern vehicles. Further, many things in the vehicle today that are demanding electrical power and advanced safety technology to convenience features. That is the main reason automakers including Fiat Chrysler Automobiles (FCA), Mercedes-Benz, and Volkswagen have started designing vehicles using 48-volt systems.

At present, Asia-Pacific dominates the market, followed by Europe, North America, and LAMEA. China dominated the global market in 2019, whereas India is expected to grow at a significant rate in Asia-Pacific during the forecast period.

The global automotive 48V system market is driven by increase in demand for hybrid and electric vehicle and rise in demand for 48V battery system. However, high cost of system in vehicles and anticipated rise in sale of battery electric vehicles are expected to hinder the growth of the market. Furthermore, increased safety & comfort features in vehicles and reduction of CO2 emission to meet future emission legislations are anticipated to provide lucrative growth opportunities for the players operating in the automotive 48V system market.

The global automotive 48V system market is segmented on the basis of architecture, vehicle class, and region. Belt Driven (P0), Crankshaft Mounted (P1), Dual-clutch transmission-mounted /input shaft of transmission (P2/P3), and transmission output shaft/ rear axle (P4) are studied under the architecture segment. Entry, mid, premium, and luxury are categorized under vehicle class. By region, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

The key players operating in the global automotive 48V system market are BorgWarner Inc., Robert Bosch GmbH, CONTINENTAL AG, Dana Limited, Delphi Technologies, GKN (Melrose Industries PLC), Lear Corporation, Magna International Inc., MAHLE Powertrain Ltd, and Valeo SA.

## KEY BENEFITS FOR STAKEHOLDERS

This study presents the analytical depiction of the automotive 48V system market along with the current trends and future

estimations to depict the imminent investment pockets.

The overall market potential is determined to understand the profitable trends to enable stakeholders gain a stronger foothold in the market.

The report presents information related to key drivers, restraints, and opportunities with detailed impact analysis.

The current market is quantitatively analyzed from 2019 to 2027 to highlight the financial competency of the market.

Porter's five forces analysis illustrates the potency of the buyers and suppliers.

## KEY MARKET SEGMENTS

### By Architecture

Belt Driven (P0)

Crankshaft Mounted (P1)

Dual-Clutch Transmission-Mounted/Input Shaft of Transmission (P2/P3)

Transmission Output Shaft/Rear Axle (P4)

### By Vehicle Class

Entry

Mid

Premium

Luxury

### By Region

North America



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FIGURE 75.VALEO: REVENUE SHARE BY REGION, 2019 (%)

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