

Global Next-generation X-in-1 Electric Powertrain Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Next-generation X-in-1 Electric Powertrain competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. In 2024, the global production of the next-generation X-in-1 electric power system will reach 7.393 million sets, with an average selling price of US\$1,142.8 per set. The development trend of electric drive technology can be roughly divided into three generations. The first generation is split, the second generation is 3-in-1, and gradually moves towards the third generation, that is, X-in-1 deep integration. Early new energy vehicles were restricted by the technical level, and the power system operation adopted a split approach, that is, the motor, electronic control (inverter), reducer and other key components were independently designed and worked separately. With the development of technology, these components began to be integrated into the motor, and the so-called "X-in-1" concept was born. The X-in-1 system is a complex integrated system that aims to reduce vehicle complexity, improve space utilization efficiency and system performance through integrated design. It integrates the electric drive system (including motor, electronic control, reducer, etc.) and the power control system (including OBC, DCDC, PDU, etc.), as well as VCU, BMS, etc. Through the X-in-1 deep integration solution, costs can be reduced, weight can be reduced, and vehicle performance and flexibility can be improved. The X-in-1 electric drive system is popular because of its many advantages. The highly integrated design can reduce the number of components, reduce the weight and volume of the system, and improve space utilization, thus providing more flexibility for vehicle design and layout. At the same time, integration can also reduce the connection lines and interfaces within the system, reduce energy loss, and improve the reliability and efficiency of the system. From the perspective of development prospects, as electric

vehicles continue to increase their requirements for range, performance and cost, all-in-one electric drive technology will play an increasingly important role. A more highly integrated electric drive system can further optimize the performance and cost structure of the vehicle and meet the market's high requirements for electric vehicles. The industry usually refers to systems with more integrated components than "3-in-1" such as "6-in-1" and "8-in-1" as X-in-1, so this report does not include 3-in-1 products.

Next-generation X-in-1 Electric Powertrain Advantages:

- Cost reduction:** BOM cost reduction is achieved by sharing hardware such as housings, wiring harnesses, connectors, etc., combined with electronic circuits and software algorithms.
- Supply chain simplification:** The X-in-1 solution helps to simplify the management of OEM supply chains, shorten development cycles, and reduce costs efficiently.
- Market trends:** The penetration rate of all-in-one solutions is increasing rapidly in electric drive systems, which has led to more automakers strengthening their demand for self-developed systems. At the same time, Tier 1 suppliers need to change their position in the value chain and increase R&D investment. The penetration rate of all-in-one systems is increasing rapidly in the electric vehicle industry, and almost all automakers are trying to develop them, mainly in front-wheel drive pure electric models. The product form of X-in-1 is developing from mechanical structure integration to deep integration of power electronics, and may move towards chip-level integration, power domain controllers, etc. in the future.
- Market Challenges:** In China, the challenge for Tier 1 in the electric drive sector is how to survive in the industry chain of highly customized all-in-one systems. The solution is to maintain the leading edge of key technologies on the one hand, and to control costs and achieve higher cost performance on the other hand. Automakers require more mastery of key technologies for components, which has led to changes in the division of labor in the domestic electric drive industry and a shift in the position of Tier 1 suppliers in the value chain. For example, issues such as EMC, NVH and reliability require continuous research and development and improvement.

The global Next-generation X-in-1 Electric Powertrain market size was estimated at USD 8449.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 26.10% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Next-generation X-in-1 Electric Powertrain market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the

industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Next-generation X-in-1 Electric Powertrain market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Next-generation X-in-1 Electric Powertrain market.

Global Next-generation X-in-1 Electric Powertrain Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Nidec Corporation
ZF Friedrichshafen AG
DENSO
BorgWarner
Nissan
Tesla
Bosch

Vitesco Technologies (Schaeffler)
Cummins
Volkswagen
Audi AG
BMW
Renault S.A.
NAVECO.
Zhuhai Enpower Electric Co.,Ltd.
CRRC
United Automotive Electronic Systems Co., Ltd.
JAC Yiwei
Suzhou Inovance Automotive Co., Ltd.
BYD
Geely
Dongfeng Motor
Huawei
Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.)
Seres Group Co., Ltd.
Changan Automobile
SAIC Motor
GAC Group
BAIC Group
Zhejiang Leapmotor Technology Co., Ltd.

Market Segmentation (by Type)

4/5/6/7/8-in-1
10/11/12-in-1
Other

Market Segmentation (by Application)

Class A0
Class A
Class B

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)
South America (Brazil, Argentina, Columbia, Rest of South America)
The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Next-generation X-in-1 Electric Powertrain Market
Overview of the regional outlook of the Next-generation X-in-1 Electric Powertrain Market:

Customization of the Report

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Next-generation X-in-1 Electric Powertrain Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream

and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Next-generation X-in-1 Electric Powertrain, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change. This enables you to anticipate market changes to remain ahead of your competitors.

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

Customization of the Report

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Contents

1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE

- 1.1 Market Definition and Statistical Scope of Next-generation X-in-1 Electric Powertrain
- 1.2 Key Market Segments
 - 1.2.1 Next-generation X-in-1 Electric Powertrain Segment by Type
 - 1.2.2 Next-generation X-in-1 Electric Powertrain Segment by Application
- 1.3 Methodology & Sources of Information
 - 1.3.1 Research Methodology
 - 1.3.2 Research Process
 - 1.3.3 Market Breakdown and Data Triangulation
 - 1.3.4 Base Year
 - 1.3.5 Report Assumptions & Caveats
- 1.4 Key Data of Global Auto Market
 - 1.4.1 Global Automobile Production by Country
 - 1.4.2 Global Automobile Production by Type

2 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET OVERVIEW

- 2.1 Global Market Overview
 - 2.1.1 Global Next-generation X-in-1 Electric Powertrain Market Size (M USD) Estimates and Forecasts (2020-2035)
 - 2.1.2 Global Next-generation X-in-1 Electric Powertrain Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

3 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET COMPETITIVE LANDSCAPE

- 3.1 Company Assessment Quadrant
- 3.2 Global Next-generation X-in-1 Electric Powertrain Product Life Cycle
- 3.3 Global Next-generation X-in-1 Electric Powertrain Sales by Manufacturers (2020-2025)
- 3.4 Global Next-generation X-in-1 Electric Powertrain Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Next-generation X-in-1 Electric Powertrain Market Share by Company Type (Tier 1, Tier 2, and Tier 3)

- 3.6 Global Next-generation X-in-1 Electric Powertrain Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Next-generation X-in-1 Electric Powertrain Market Competitive Situation and Trends
 - 3.8.1 Next-generation X-in-1 Electric Powertrain Market Concentration Rate
 - 3.8.2 Global 5 and 10 Largest Next-generation X-in-1 Electric Powertrain Players Market Share by Revenue
 - 3.8.3 Mergers & Acquisitions, Expansion

4 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN INDUSTRY CHAIN ANALYSIS

- 4.1 Next-generation X-in-1 Electric Powertrain Industry Chain Analysis
- 4.2 Market Overview of Key Raw Materials
- 4.3 Midstream Market Analysis
- 4.4 Downstream Customer Analysis

5 THE DEVELOPMENT AND DYNAMICS OF NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET

- 5.1 Key Development Trends
- 5.2 Driving Factors
- 5.3 Market Challenges
- 5.4 Industry News
 - 5.4.1 New Product Developments
 - 5.4.2 Mergers & Acquisitions
 - 5.4.3 Expansions
 - 5.4.4 Collaboration/Supply Contracts
- 5.5 PEST Analysis
 - 5.5.1 Industry Policies Analysis
 - 5.5.2 Economic Environment Analysis
 - 5.5.3 Social Environment Analysis
 - 5.5.4 Technological Environment Analysis
- 5.6 Global Next-generation X-in-1 Electric Powertrain Market Porter's Five Forces Analysis
 - 5.6.1 Global Trade Frictions
 - 5.6.2 U.S. Tariff Policy ? April 2025
 - 5.6.3 Global Trade Frictions and Their Impacts to Next-generation X-in-1 Electric Powertrain Market

5.7 ESG Ratings of Leading Companies

6 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET SEGMENTATION BY TYPE

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Type (2020-2025)

6.3 Global Next-generation X-in-1 Electric Powertrain Market Size by Type (2020-2025)

6.4 Global Next-generation X-in-1 Electric Powertrain Price by Type (2020-2025)

7 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET SEGMENTATION BY APPLICATION

7.1 Evaluation Matrix of Segment Market Development Potential (Application)

7.2 Global Next-generation X-in-1 Electric Powertrain Market Sales by Application (2020-2025)

7.3 Global Next-generation X-in-1 Electric Powertrain Market Size (M USD) by Application (2020-2025)

7.4 Global Next-generation X-in-1 Electric Powertrain Sales Growth Rate by Application (2020-2025)

8 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET SALES BY REGION

8.1 Global Next-generation X-in-1 Electric Powertrain Sales by Region

8.1.1 Global Next-generation X-in-1 Electric Powertrain Sales by Region

8.1.2 Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Region

8.2 Global Next-generation X-in-1 Electric Powertrain Market Size by Region

8.2.1 Global Next-generation X-in-1 Electric Powertrain Market Size by Region

8.2.2 Global Next-generation X-in-1 Electric Powertrain Market Size by Region

8.3 North America

8.3.1 North America Next-generation X-in-1 Electric Powertrain Sales by Country

8.3.2 North America Next-generation X-in-1 Electric Powertrain Market Size by Country

8.3.3 U.S. Market Overview

8.3.4 Canada Market Overview

8.3.5 Mexico Market Overview

8.4 Europe

- 8.4.1 Europe Next-generation X-in-1 Electric Powertrain Sales by Country
- 8.4.2 Europe Next-generation X-in-1 Electric Powertrain Market Size by Country
- 8.4.3 Germany Market Overview
- 8.4.4 France Market Overview
- 8.4.5 U.K. Market Overview
- 8.4.6 Italy Market Overview
- 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
 - 8.5.1 Asia Pacific Next-generation X-in-1 Electric Powertrain Sales by Region
 - 8.5.2 Asia Pacific Next-generation X-in-1 Electric Powertrain Market Size by Region
 - 8.5.3 China Market Overview
 - 8.5.4 Japan Market Overview
 - 8.5.5 South Korea Market Overview
 - 8.5.6 India Market Overview
 - 8.5.7 Southeast Asia Market Overview
- 8.6 South America
 - 8.6.1 South America Next-generation X-in-1 Electric Powertrain Sales by Country
 - 8.6.2 South America Next-generation X-in-1 Electric Powertrain Market Size by Country
 - 8.6.3 Brazil Market Overview
 - 8.6.4 Argentina Market Overview
 - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
 - 8.7.1 Middle East and Africa Next-generation X-in-1 Electric Powertrain Sales by Region
 - 8.7.2 Middle East and Africa Next-generation X-in-1 Electric Powertrain Market Size by Region
 - 8.7.3 Saudi Arabia Market Overview
 - 8.7.4 UAE Market Overview
 - 8.7.5 Egypt Market Overview
 - 8.7.6 Nigeria Market Overview
 - 8.7.7 South Africa Market Overview

9 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET PRODUCTION BY REGION

- 9.1 Global Production of Next-generation X-in-1 Electric Powertrain by Region(2020-2025)
- 9.2 Global Next-generation X-in-1 Electric Powertrain Revenue Market Share by Region

(2020-2025)

9.3 Global Next-generation X-in-1 Electric Powertrain Production, Revenue, Price and Gross Margin (2020-2025)

9.4 North America Next-generation X-in-1 Electric Powertrain Production

9.4.1 North America Next-generation X-in-1 Electric Powertrain Production Growth Rate (2020-2025)

9.4.2 North America Next-generation X-in-1 Electric Powertrain Production, Revenue, Price and Gross Margin (2020-2025)

9.5 Europe Next-generation X-in-1 Electric Powertrain Production

9.5.1 Europe Next-generation X-in-1 Electric Powertrain Production Growth Rate (2020-2025)

9.5.2 Europe Next-generation X-in-1 Electric Powertrain Production, Revenue, Price and Gross Margin (2020-2025)

9.6 Japan Next-generation X-in-1 Electric Powertrain Production (2020-2025)

9.6.1 Japan Next-generation X-in-1 Electric Powertrain Production Growth Rate (2020-2025)

9.6.2 Japan Next-generation X-in-1 Electric Powertrain Production, Revenue, Price and Gross Margin (2020-2025)

9.7 China Next-generation X-in-1 Electric Powertrain Production (2020-2025)

9.7.1 China Next-generation X-in-1 Electric Powertrain Production Growth Rate (2020-2025)

9.7.2 China Next-generation X-in-1 Electric Powertrain Production, Revenue, Price and Gross Margin (2020-2025)

10 KEY COMPANIES PROFILE

10.1 Nidec Corporation

10.1.1 Nidec Corporation Basic Information

10.1.2 Nidec Corporation Next-generation X-in-1 Electric Powertrain Product Overview

10.1.3 Nidec Corporation Next-generation X-in-1 Electric Powertrain Product Market Performance

10.1.4 Nidec Corporation Business Overview

10.1.5 Nidec Corporation SWOT Analysis

10.1.6 Nidec Corporation Recent Developments

10.2 ZF Friedrichshafen AG

10.2.1 ZF Friedrichshafen AG Basic Information

10.2.2 ZF Friedrichshafen AG Next-generation X-in-1 Electric Powertrain Product Overview

10.2.3 ZF Friedrichshafen AG Next-generation X-in-1 Electric Powertrain Product

Market Performance

- 10.2.4 ZF Friedrichshafen AG Business Overview
- 10.2.5 ZF Friedrichshafen AG SWOT Analysis
- 10.2.6 ZF Friedrichshafen AG Recent Developments

10.3 DENSO

- 10.3.1 DENSO Basic Information
- 10.3.2 DENSO Next-generation X-in-1 Electric Powertrain Product Overview
- 10.3.3 DENSO Next-generation X-in-1 Electric Powertrain Product Market

Performance

- 10.3.4 DENSO Business Overview
- 10.3.5 DENSO SWOT Analysis
- 10.3.6 DENSO Recent Developments

10.4 BorgWarner

- 10.4.1 BorgWarner Basic Information
- 10.4.2 BorgWarner Next-generation X-in-1 Electric Powertrain Product Overview
- 10.4.3 BorgWarner Next-generation X-in-1 Electric Powertrain Product Market

Performance

- 10.4.4 BorgWarner Business Overview
- 10.4.5 BorgWarner Recent Developments

10.5 Nissan

- 10.5.1 Nissan Basic Information
- 10.5.2 Nissan Next-generation X-in-1 Electric Powertrain Product Overview
- 10.5.3 Nissan Next-generation X-in-1 Electric Powertrain Product Market Performance
- 10.5.4 Nissan Business Overview
- 10.5.5 Nissan Recent Developments

10.6 Tesla

- 10.6.1 Tesla Basic Information
- 10.6.2 Tesla Next-generation X-in-1 Electric Powertrain Product Overview
- 10.6.3 Tesla Next-generation X-in-1 Electric Powertrain Product Market Performance
- 10.6.4 Tesla Business Overview
- 10.6.5 Tesla Recent Developments

10.7 Bosch

- 10.7.1 Bosch Basic Information
- 10.7.2 Bosch Next-generation X-in-1 Electric Powertrain Product Overview
- 10.7.3 Bosch Next-generation X-in-1 Electric Powertrain Product Market Performance
- 10.7.4 Bosch Business Overview
- 10.7.5 Bosch Recent Developments

10.8 Vitesco Technologies (Schaeffler)

- 10.8.1 Vitesco Technologies (Schaeffler) Basic Information

10.8.2 Vitesco Technologies (Schaeffler) Next-generation X-in-1 Electric Powertrain Product Overview

10.8.3 Vitesco Technologies (Schaeffler) Next-generation X-in-1 Electric Powertrain Product Market Performance

10.8.4 Vitesco Technologies (Schaeffler) Business Overview

10.8.5 Vitesco Technologies (Schaeffler) Recent Developments

10.9 Cummins

10.9.1 Cummins Basic Information

10.9.2 Cummins Next-generation X-in-1 Electric Powertrain Product Overview

10.9.3 Cummins Next-generation X-in-1 Electric Powertrain Product Market Performance

10.9.4 Cummins Business Overview

10.9.5 Cummins Recent Developments

10.10 Volkswagen

10.10.1 Volkswagen Basic Information

10.10.2 Volkswagen Next-generation X-in-1 Electric Powertrain Product Overview

10.10.3 Volkswagen Next-generation X-in-1 Electric Powertrain Product Market Performance

10.10.4 Volkswagen Business Overview

10.10.5 Volkswagen Recent Developments

10.11 Audi AG

10.11.1 Audi AG Basic Information

10.11.2 Audi AG Next-generation X-in-1 Electric Powertrain Product Overview

10.11.3 Audi AG Next-generation X-in-1 Electric Powertrain Product Market Performance

10.11.4 Audi AG Business Overview

10.11.5 Audi AG Recent Developments

10.12 BMW

10.12.1 BMW Basic Information

10.12.2 BMW Next-generation X-in-1 Electric Powertrain Product Overview

10.12.3 BMW Next-generation X-in-1 Electric Powertrain Product Market Performance

10.12.4 BMW Business Overview

10.12.5 BMW Recent Developments

10.13 Renault S.A.

10.13.1 Renault S.A. Basic Information

10.13.2 Renault S.A. Next-generation X-in-1 Electric Powertrain Product Overview

10.13.3 Renault S.A. Next-generation X-in-1 Electric Powertrain Product Market Performance

10.13.4 Renault S.A. Business Overview

- 10.13.5 Renault S.A. Recent Developments
- 10.14 NAVECO.
 - 10.14.1 NAVECO. Basic Information
 - 10.14.2 NAVECO. Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.14.3 NAVECO. Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.14.4 NAVECO. Business Overview
 - 10.14.5 NAVECO. Recent Developments
- 10.15 Zhuhai Enpower Electric Co.,Ltd.
 - 10.15.1 Zhuhai Enpower Electric Co.,Ltd. Basic Information
 - 10.15.2 Zhuhai Enpower Electric Co.,Ltd. Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.15.3 Zhuhai Enpower Electric Co.,Ltd. Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.15.4 Zhuhai Enpower Electric Co.,Ltd. Business Overview
 - 10.15.5 Zhuhai Enpower Electric Co.,Ltd. Recent Developments
- 10.16 CRRC
 - 10.16.1 CRRC Basic Information
 - 10.16.2 CRRC Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.16.3 CRRC Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.16.4 CRRC Business Overview
 - 10.16.5 CRRC Recent Developments
- 10.17 United Automotive Electronic Systems Co., Ltd.
 - 10.17.1 United Automotive Electronic Systems Co., Ltd. Basic Information
 - 10.17.2 United Automotive Electronic Systems Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.17.3 United Automotive Electronic Systems Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.17.4 United Automotive Electronic Systems Co., Ltd. Business Overview
 - 10.17.5 United Automotive Electronic Systems Co., Ltd. Recent Developments
- 10.18 JAC Yiwei
 - 10.18.1 JAC Yiwei Basic Information
 - 10.18.2 JAC Yiwei Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.18.3 JAC Yiwei Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.18.4 JAC Yiwei Business Overview
 - 10.18.5 JAC Yiwei Recent Developments
- 10.19 Suzhou Inovance Automotive Co., Ltd.

- 10.19.1 Suzhou Inovance Automotive Co., Ltd. Basic Information
- 10.19.2 Suzhou Inovance Automotive Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview
- 10.19.3 Suzhou Inovance Automotive Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Market Performance
- 10.19.4 Suzhou Inovance Automotive Co., Ltd. Business Overview
- 10.19.5 Suzhou Inovance Automotive Co., Ltd. Recent Developments
- 10.20 BYD
 - 10.20.1 BYD Basic Information
 - 10.20.2 BYD Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.20.3 BYD Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.20.4 BYD Business Overview
 - 10.20.5 BYD Recent Developments
- 10.21 Geely
 - 10.21.1 Geely Basic Information
 - 10.21.2 Geely Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.21.3 Geely Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.21.4 Geely Business Overview
 - 10.21.5 Geely Recent Developments
- 10.22 Dongfeng Motor
 - 10.22.1 Dongfeng Motor Basic Information
 - 10.22.2 Dongfeng Motor Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.22.3 Dongfeng Motor Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.22.4 Dongfeng Motor Business Overview
 - 10.22.5 Dongfeng Motor Recent Developments
- 10.23 Huawei
 - 10.23.1 Huawei Basic Information
 - 10.23.2 Huawei Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.23.3 Huawei Next-generation X-in-1 Electric Powertrain Product Market Performance
 - 10.23.4 Huawei Business Overview
 - 10.23.5 Huawei Recent Developments
- 10.24 Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.)
 - 10.24.1 Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Basic Information
 - 10.24.2 Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Next-generation X-in-1 Electric Powertrain Product Overview
 - 10.24.3 Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Next-

generation X-in-1 Electric Powertrain Product Market Performance

10.24.4 Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Business Overview

10.24.5 Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Recent Developments

10.25 Seres Group Co., Ltd.

10.25.1 Seres Group Co., Ltd. Basic Information

10.25.2 Seres Group Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview

10.25.3 Seres Group Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Market Performance

10.25.4 Seres Group Co., Ltd. Business Overview

10.25.5 Seres Group Co., Ltd. Recent Developments

10.26 Changan Automobile

10.26.1 Changan Automobile Basic Information

10.26.2 Changan Automobile Next-generation X-in-1 Electric Powertrain Product Overview

10.26.3 Changan Automobile Next-generation X-in-1 Electric Powertrain Product Market Performance

10.26.4 Changan Automobile Business Overview

10.26.5 Changan Automobile Recent Developments

10.27 SAIC Motor

10.27.1 SAIC Motor Basic Information

10.27.2 SAIC Motor Next-generation X-in-1 Electric Powertrain Product Overview

10.27.3 SAIC Motor Next-generation X-in-1 Electric Powertrain Product Market Performance

10.27.4 SAIC Motor Business Overview

10.27.5 SAIC Motor Recent Developments

10.28 GAC Group

10.28.1 GAC Group Basic Information

10.28.2 GAC Group Next-generation X-in-1 Electric Powertrain Product Overview

10.28.3 GAC Group Next-generation X-in-1 Electric Powertrain Product Market Performance

10.28.4 GAC Group Business Overview

10.28.5 GAC Group Recent Developments

10.29 BAIC Group

10.29.1 BAIC Group Basic Information

10.29.2 BAIC Group Next-generation X-in-1 Electric Powertrain Product Overview

10.29.3 BAIC Group Next-generation X-in-1 Electric Powertrain Product Market

Performance

10.29.4 BAIC Group Business Overview

10.29.5 BAIC Group Recent Developments

10.30 Zhejiang Leapmotor Technology Co., Ltd.

10.30.1 Zhejiang Leapmotor Technology Co., Ltd. Basic Information

10.30.2 Zhejiang Leapmotor Technology Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview

10.30.3 Zhejiang Leapmotor Technology Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Market Performance

10.30.4 Zhejiang Leapmotor Technology Co., Ltd. Business Overview

10.30.5 Zhejiang Leapmotor Technology Co., Ltd. Recent Developments

11 NEXT-GENERATION X-IN-1 ELECTRIC POWERTRAIN MARKET FORECAST BY REGION

11.1 Global Next-generation X-in-1 Electric Powertrain Market Size Forecast

11.2 Global Next-generation X-in-1 Electric Powertrain Market Forecast by Region

11.2.1 North America Market Size Forecast by Country

11.2.2 Europe Next-generation X-in-1 Electric Powertrain Market Size Forecast by Country

11.2.3 Asia Pacific Next-generation X-in-1 Electric Powertrain Market Size Forecast by Region

11.2.4 South America Next-generation X-in-1 Electric Powertrain Market Size Forecast by Country

11.2.5 Middle East and Africa Forecasted Sales of Next-generation X-in-1 Electric Powertrain by Country

12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)

12.1 Global Next-generation X-in-1 Electric Powertrain Market Forecast by Type (2026-2035)

12.1.1 Global Forecasted Sales of Next-generation X-in-1 Electric Powertrain by Type (2026-2035)

12.1.2 Global Next-generation X-in-1 Electric Powertrain Market Size Forecast by Type (2026-2035)

12.1.3 Global Forecasted Price of Next-generation X-in-1 Electric Powertrain by Type (2026-2035)

12.2 Global Next-generation X-in-1 Electric Powertrain Market Forecast by Application (2026-2035)

12.2.1 Global Next-generation X-in-1 Electric Powertrain Sales (K Units) Forecast by Application

12.2.2 Global Next-generation X-in-1 Electric Powertrain Market Size (M USD) Forecast by Application (2026-2035)

13 CONCLUSION AND KEY FINDINGS

List Of Tables

LIST OF TABLES

Table 1. Introduction of the Type

Table 2. Introduction of the Application

Table 3. Global Automobile Production by Region (Units)

Table 4. Market Share and Development Potential of Automobiles by Region

Table 5. Global Automobile Production by Country (Units)

Table 6. Market Share and Development Potential of Automobiles by Country

Table 7. Motor Vehicle Production Market Share by Type (2024)

Table 8. Global Automobile Production by Type

Table 9. Market Share and Development Potential of Automobiles by Type

Table 10. Global Next-generation X-in-1 Electric Powertrain Market Size by Type (M USD)

Table 11. Global Next-generation X-in-1 Electric Powertrain Market Size by Application

Table 12. Next-generation X-in-1 Electric Powertrain Market Size Comparison by Region (M USD)

Table 13. Global Next-generation X-in-1 Electric Powertrain Sales (K Units) by Manufacturers (2020-2025)

Table 14. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Manufacturers (2020-2025)

Table 15. Global Next-generation X-in-1 Electric Powertrain Revenue (M USD) by Manufacturers (2020-2025)

Table 16. Global Next-generation X-in-1 Electric Powertrain Revenue Share by Manufacturers (2020-2025)

Table 17. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Next-generation X-in-1 Electric Powertrain as of 2025)

Table 18. Global Market Next-generation X-in-1 Electric Powertrain Average Price (USD/Unit) of Key Manufacturers (2020-2025)

Table 19. Manufacturers? Manufacturing Sites, Areas Served

Table 20. Manufacturers? Product Type

Table 21. Global Next-generation X-in-1 Electric Powertrain Manufacturers Market Concentration Ratio (CR5 and HHI)

Table 22. Mergers & Acquisitions, Expansion Plans

Table 23. Market Overview of Key Raw Materials

Table 24. Midstream Market Analysis

Table 25. Downstream Customer Analysis

Table 26. Key Development Trends

Table 27. Driving Factors

Table 28. Next-generation X-in-1 Electric Powertrain Market Challenges

Table 29. Goldman Sachs' forecast real GDP growth rate for 2025-2026

Table 30. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027

Table 31. World Bank ' Forecast Real GDP Growth Rate For 2025-2026

Table 32. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries

Table 33. Global Next-generation X-in-1 Electric Powertrain Sales by Type (K Units)

Table 34. Global Next-generation X-in-1 Electric Powertrain Market Size by Type (M USD)

Table 35. Global Next-generation X-in-1 Electric Powertrain Sales (K Units) by Type (2020-2025)

Table 36. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Type (2020-2025)

Table 37. Global Next-generation X-in-1 Electric Powertrain Market Size (M USD) by Type (2020-2025)

Table 38. Global Next-generation X-in-1 Electric Powertrain Market Share by Type (2020-2025)

Table 39. Global Next-generation X-in-1 Electric Powertrain Price (USD/Unit) by Type (2020-2025)

Table 40. Global Next-generation X-in-1 Electric Powertrain Sales (K Units) by Application

Table 41. Global Next-generation X-in-1 Electric Powertrain Market Size by Application

Table 42. Global Next-generation X-in-1 Electric Powertrain Sales by Application (2020-2025) & (K Units)

Table 43. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Application (2020-2025)

Table 44. Global Next-generation X-in-1 Electric Powertrain Market Size by Application (2020-2025) & (M USD)

Table 45. Global Next-generation X-in-1 Electric Powertrain Market Share by Application (2020-2025)

Table 46. Global Next-generation X-in-1 Electric Powertrain Sales Growth Rate by Application (2020-2025)

Table 47. Global Next-generation X-in-1 Electric Powertrain Sales by Region (2020-2025) & (K Units)

Table 48. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Region (2020-2025)

Table 49. Global Next-generation X-in-1 Electric Powertrain Market Size by Region (2020-2025) & (M USD)

Table 50. Global Next-generation X-in-1 Electric Powertrain Market Size by Region (2020-2025)

Table 51. North America Next-generation X-in-1 Electric Powertrain Sales by Country (2020-2025) & (K Units)

Table 52. North America Next-generation X-in-1 Electric Powertrain Market Size by Country (2020-2025) & (M USD)

Table 53. Europe Next-generation X-in-1 Electric Powertrain Sales by Country (2020-2025) & (K Units)

Table 54. Europe Next-generation X-in-1 Electric Powertrain Market Size by Country (2020-2025) & (M USD)

Table 55. Asia Pacific Next-generation X-in-1 Electric Powertrain Sales by Region (2020-2025) & (K Units)

Table 56. Asia Pacific Next-generation X-in-1 Electric Powertrain Market Size by Region (2020-2025) & (M USD)

Table 57. South America Next-generation X-in-1 Electric Powertrain Sales by Country (2020-2025) & (K Units)

Table 58. South America Next-generation X-in-1 Electric Powertrain Market Size by Country (2020-2025) & (M USD)

Table 59. Middle East and Africa Next-generation X-in-1 Electric Powertrain Sales by Region (2020-2025) & (K Units)

Table 60. Middle East and Africa Next-generation X-in-1 Electric Powertrain Market Size by Region (2020-2025) & (M USD)

Table 61. Global Next-generation X-in-1 Electric Powertrain Production (K Units) by Region(2020-2025)

Table 62. Global Next-generation X-in-1 Electric Powertrain Revenue (US\$ Million) by Region (2020-2025)

Table 63. Global Next-generation X-in-1 Electric Powertrain Revenue Market Share by Region (2020-2025)

Table 64. Global Next-generation X-in-1 Electric Powertrain Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. North America Next-generation X-in-1 Electric Powertrain Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 66. Europe Next-generation X-in-1 Electric Powertrain Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 67. Japan Next-generation X-in-1 Electric Powertrain Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 68. China Next-generation X-in-1 Electric Powertrain Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 69. Nidec Corporation Basic Information

Table 70. Nidec Corporation Next-generation X-in-1 Electric Powertrain Product Overview

Table 71. Nidec Corporation Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 72. Nidec Corporation Business Overview

Table 73. Nidec Corporation SWOT Analysis

Table 74. Nidec Corporation Recent Developments

Table 75. ZF Friedrichshafen AG Basic Information

Table 76. ZF Friedrichshafen AG Next-generation X-in-1 Electric Powertrain Product Overview

Table 77. ZF Friedrichshafen AG Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 78. ZF Friedrichshafen AG Business Overview

Table 79. ZF Friedrichshafen AG SWOT Analysis

Table 80. ZF Friedrichshafen AG Recent Developments

Table 81. DENSO Basic Information

Table 82. DENSO Next-generation X-in-1 Electric Powertrain Product Overview

Table 83. DENSO Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 84. DENSO Business Overview

Table 85. DENSO SWOT Analysis

Table 86. DENSO Recent Developments

Table 87. BorgWarner Basic Information

Table 88. BorgWarner Next-generation X-in-1 Electric Powertrain Product Overview

Table 89. BorgWarner Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 90. BorgWarner Business Overview

Table 91. BorgWarner Recent Developments

Table 92. Nissan Basic Information

Table 93. Nissan Next-generation X-in-1 Electric Powertrain Product Overview

Table 94. Nissan Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 95. Nissan Business Overview

Table 96. Nissan Recent Developments

Table 97. Tesla Basic Information

Table 98. Tesla Next-generation X-in-1 Electric Powertrain Product Overview

Table 99. Tesla Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 100. Tesla Business Overview

- Table 101. Tesla Recent Developments
- Table 102. Bosch Basic Information
- Table 103. Bosch Next-generation X-in-1 Electric Powertrain Product Overview
- Table 104. Bosch Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 105. Bosch Business Overview
- Table 106. Bosch Recent Developments
- Table 107. Vitesco Technologies (Schaeffler) Basic Information
- Table 108. Vitesco Technologies (Schaeffler) Next-generation X-in-1 Electric Powertrain Product Overview
- Table 109. Vitesco Technologies (Schaeffler) Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 110. Vitesco Technologies (Schaeffler) Business Overview
- Table 111. Vitesco Technologies (Schaeffler) Recent Developments
- Table 112. Cummins Basic Information
- Table 113. Cummins Next-generation X-in-1 Electric Powertrain Product Overview
- Table 114. Cummins Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 115. Cummins Business Overview
- Table 116. Cummins Recent Developments
- Table 117. Volkswagen Basic Information
- Table 118. Volkswagen Next-generation X-in-1 Electric Powertrain Product Overview
- Table 119. Volkswagen Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 120. Volkswagen Business Overview
- Table 121. Volkswagen Recent Developments
- Table 122. Audi AG Basic Information
- Table 123. Audi AG Next-generation X-in-1 Electric Powertrain Product Overview
- Table 124. Audi AG Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 125. Audi AG Business Overview
- Table 126. Audi AG Recent Developments
- Table 127. BMW Basic Information
- Table 128. BMW Next-generation X-in-1 Electric Powertrain Product Overview
- Table 129. BMW Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 130. BMW Business Overview
- Table 131. BMW Recent Developments
- Table 132. Renault S.A. Basic Information

- Table 133. Renault S.A. Next-generation X-in-1 Electric Powertrain Product Overview
- Table 134. Renault S.A. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 135. Renault S.A. Business Overview
- Table 136. Renault S.A. Recent Developments
- Table 137. NAVECO. Basic Information
- Table 138. NAVECO. Next-generation X-in-1 Electric Powertrain Product Overview
- Table 139. NAVECO. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 140. NAVECO. Business Overview
- Table 141. NAVECO. Recent Developments
- Table 142. Zhuhai Enpower Electric Co.,Ltd. Basic Information
- Table 143. Zhuhai Enpower Electric Co.,Ltd. Next-generation X-in-1 Electric Powertrain Product Overview
- Table 144. Zhuhai Enpower Electric Co.,Ltd. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 145. Zhuhai Enpower Electric Co.,Ltd. Business Overview
- Table 146. Zhuhai Enpower Electric Co.,Ltd. Recent Developments
- Table 147. CRRC Basic Information
- Table 148. CRRC Next-generation X-in-1 Electric Powertrain Product Overview
- Table 149. CRRC Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 150. CRRC Business Overview
- Table 151. CRRC Recent Developments
- Table 152. United Automotive Electronic Systems Co., Ltd. Basic Information
- Table 153. United Automotive Electronic Systems Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview
- Table 154. United Automotive Electronic Systems Co., Ltd. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 155. United Automotive Electronic Systems Co., Ltd. Business Overview
- Table 156. United Automotive Electronic Systems Co., Ltd. Recent Developments
- Table 157. JAC Yiwei Basic Information
- Table 158. JAC Yiwei Next-generation X-in-1 Electric Powertrain Product Overview
- Table 159. JAC Yiwei Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 160. JAC Yiwei Business Overview
- Table 161. JAC Yiwei Recent Developments
- Table 162. Suzhou Inovance Automotive Co., Ltd. Basic Information

Table 163. Suzhou Inovance Automotive Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview

Table 164. Suzhou Inovance Automotive Co., Ltd. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 165. Suzhou Inovance Automotive Co., Ltd. Business Overview

Table 166. Suzhou Inovance Automotive Co., Ltd. Recent Developments

Table 167. BYD Basic Information

Table 168. BYD Next-generation X-in-1 Electric Powertrain Product Overview

Table 169. BYD Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 170. BYD Business Overview

Table 171. BYD Recent Developments

Table 172. Geely Basic Information

Table 173. Geely Next-generation X-in-1 Electric Powertrain Product Overview

Table 174. Geely Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 175. Geely Business Overview

Table 176. Geely Recent Developments

Table 177. Dongfeng Motor Basic Information

Table 178. Dongfeng Motor Next-generation X-in-1 Electric Powertrain Product Overview

Table 179. Dongfeng Motor Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 180. Dongfeng Motor Business Overview

Table 181. Dongfeng Motor Recent Developments

Table 182. Huawei Basic Information

Table 183. Huawei Next-generation X-in-1 Electric Powertrain Product Overview

Table 184. Huawei Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 185. Huawei Business Overview

Table 186. Huawei Recent Developments

Table 187. Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Basic Information

Table 188. Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Next-generation X-in-1 Electric Powertrain Product Overview

Table 189. Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

- Table 190. Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Business Overview
- Table 191. Shanghai Edrive Co., Ltd.(Zhongshan Broad-Ocean Motor Co., Ltd.) Recent Developments
- Table 192. Seres Group Co., Ltd. Basic Information
- Table 193. Seres Group Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview
- Table 194. Seres Group Co., Ltd. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 195. Seres Group Co., Ltd. Business Overview
- Table 196. Seres Group Co., Ltd. Recent Developments
- Table 197. Changan Automobile Basic Information
- Table 198. Changan Automobile Next-generation X-in-1 Electric Powertrain Product Overview
- Table 199. Changan Automobile Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 200. Changan Automobile Business Overview
- Table 201. Changan Automobile Recent Developments
- Table 202. SAIC Motor Basic Information
- Table 203. SAIC Motor Next-generation X-in-1 Electric Powertrain Product Overview
- Table 204. SAIC Motor Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 205. SAIC Motor Business Overview
- Table 206. SAIC Motor Recent Developments
- Table 207. GAC Group Basic Information
- Table 208. GAC Group Next-generation X-in-1 Electric Powertrain Product Overview
- Table 209. GAC Group Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 210. GAC Group Business Overview
- Table 211. GAC Group Recent Developments
- Table 212. BAIC Group Basic Information
- Table 213. BAIC Group Next-generation X-in-1 Electric Powertrain Product Overview
- Table 214. BAIC Group Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 215. BAIC Group Business Overview
- Table 216. BAIC Group Recent Developments
- Table 217. Zhejiang Leapmotor Technology Co., Ltd. Basic Information
- Table 218. Zhejiang Leapmotor Technology Co., Ltd. Next-generation X-in-1 Electric Powertrain Product Overview

Table 219. Zhejiang Leapmotor Technology Co., Ltd. Next-generation X-in-1 Electric Powertrain Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 220. Zhejiang Leapmotor Technology Co., Ltd. Business Overview

Table 221. Zhejiang Leapmotor Technology Co., Ltd. Recent Developments

Table 222. Global Next-generation X-in-1 Electric Powertrain Sales Forecast by Region (2026-2035) & (K Units)

Table 223. Global Next-generation X-in-1 Electric Powertrain Market Size Forecast by Region (2026-2035) & (M USD)

Table 224. North America Next-generation X-in-1 Electric Powertrain Sales Forecast by Country (2026-2035) & (K Units)

Table 225. North America Next-generation X-in-1 Electric Powertrain Market Size Forecast by Country (2026-2035) & (M USD)

Table 226. Europe Next-generation X-in-1 Electric Powertrain Sales Forecast by Country (2026-2035) & (K Units)

Table 227. Europe Next-generation X-in-1 Electric Powertrain Market Size Forecast by Country (2026-2035) & (M USD)

Table 228. Asia Pacific Next-generation X-in-1 Electric Powertrain Sales Forecast by Region (2026-2035) & (K Units)

Table 229. Asia Pacific Next-generation X-in-1 Electric Powertrain Market Size Forecast by Region (2026-2035) & (M USD)

Table 230. South America Next-generation X-in-1 Electric Powertrain Sales Forecast by Country (2026-2035) & (K Units)

Table 231. South America Next-generation X-in-1 Electric Powertrain Market Size Forecast by Country (2026-2035) & (M USD)

Table 232. Middle East and Africa Next-generation X-in-1 Electric Powertrain Sales Forecast by Country (2026-2035) & (Units)

Table 233. Middle East and Africa Next-generation X-in-1 Electric Powertrain Market Size Forecast by Country (2026-2035) & (M USD)

Table 234. Global Next-generation X-in-1 Electric Powertrain Sales Forecast by Type (2026-2035) & (K Units)

Table 235. Global Next-generation X-in-1 Electric Powertrain Market Size Forecast by Type (2026-2035) & (M USD)

Table 236. Global Next-generation X-in-1 Electric Powertrain Price Forecast by Type (2026-2035) & (USD/Unit)

Table 237. Global Next-generation X-in-1 Electric Powertrain Sales (K Units) Forecast by Application (2026-2035)

Table 238. Global Next-generation X-in-1 Electric Powertrain Market Size Forecast by Application (2026-2035) & (M USD)

List Of Figures

LIST OF FIGURES

- Figure 1. Product Picture of Next-generation X-in-1 Electric Powertrain
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Motor Vehicle Production (M Units)
- Figure 5. Global Next-generation X-in-1 Electric Powertrain Market Size (M USD), 2025-2035
- Figure 6. Global Next-generation X-in-1 Electric Powertrain Market Size (M USD) (2020-2035)
- Figure 7. Global Next-generation X-in-1 Electric Powertrain Sales (K Units) & (2020-2035)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 9. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 10. Evaluation Matrix of Regional Market Development Potential
- Figure 11. Next-generation X-in-1 Electric Powertrain Market Size by Country (M USD)
- Figure 12. Company Assessment Quadrant
- Figure 13. Global Next-generation X-in-1 Electric Powertrain Product Life Cycle
- Figure 14. Next-generation X-in-1 Electric Powertrain Sales Share by Manufacturers in 2025
- Figure 15. Global Next-generation X-in-1 Electric Powertrain Revenue Share by Manufacturers in 2025
- Figure 16. Next-generation X-in-1 Electric Powertrain Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 17. Global Market Next-generation X-in-1 Electric Powertrain Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 18. The Global 5 and 10 Largest Players: Market Share by Next-generation X-in-1 Electric Powertrain Revenue in 2025
- Figure 19. Industry Chain Map of Next-generation X-in-1 Electric Powertrain
- Figure 20. Global Next-generation X-in-1 Electric Powertrain Market PEST Analysis
- Figure 21. Global Next-generation X-in-1 Electric Powertrain Market Porter's Five Forces Analysis
- Figure 22. Global Merchandise Trade as a Percentage Of GDP
- Figure 23. US - Imports of Goods by Country
- Figure 24. China Exports by Country
- Figure 25. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 26. Evaluation Matrix of Segment Market Development Potential (Type)

Figure 27. Global Next-generation X-in-1 Electric Powertrain Market Share by Type

Figure 28. Sales Market Share of Next-generation X-in-1 Electric Powertrain by Type (2020-2025)

Figure 29. Sales Market Share of Next-generation X-in-1 Electric Powertrain by Type in 2025

Figure 30. Market Share of Next-generation X-in-1 Electric Powertrain by Type (2020-2025)

Figure 31. Market Share of Next-generation X-in-1 Electric Powertrain by Type in 2025

Figure 32. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 33. Global Next-generation X-in-1 Electric Powertrain Market Share by Application

Figure 34. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Application (2020-2025)

Figure 35. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Application in 2025

Figure 36. Global Next-generation X-in-1 Electric Powertrain Market Share by Application (2020-2025)

Figure 37. Global Next-generation X-in-1 Electric Powertrain Market Share by Application in 2025

Figure 38. Global Next-generation X-in-1 Electric Powertrain Sales Growth Rate by Application (2020-2025)

Figure 39. Global Next-generation X-in-1 Electric Powertrain Sales Market Share by Region (2020-2025)

Figure 40. Global Next-generation X-in-1 Electric Powertrain Market Size by Region (2020-2025)

Figure 41. North America Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 43. North America Next-generation X-in-1 Electric Powertrain Sales Market Share by Country in 2024

Figure 44. North America Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 45. North America Next-generation X-in-1 Electric Powertrain Market Size by Country in 2024

Figure 46. U.S. Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 47. U.S. Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 48. Canada Next-generation X-in-1 Electric Powertrain Sales (K Units) and Growth Rate (2020-2025)

Figure 49. Canada Next-generation X-in-1 Electric Powertrain Market Size (M USD) and Growth Rate (2020-2025)

Figure 50. Mexico Next-generation X-in-1 Electric Powertrain Sales (Units) and Growth Rate (2020-2025)

Figure 51. Mexico Next-generation X-in-1 Electric Powertrain Market Size (Units) and Growth Rate (2020-2025)

Figure 52. Europe Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 53. Europe Next-generation X-in-1 Electric Powertrain Sales Market Share by Country in 2024

Figure 54. Europe Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 55. Europe Next-generation X-in-1 Electric Powertrain Market Size by Country in 2024

Figure 56. Germany Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 57. Germany Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 58. France Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 59. France Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 60. U.K. Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 61. U.K. Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 62. Italy Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 63. Italy Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 64. Spain Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 65. Spain Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 66. Asia Pacific Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (K Units)

Figure 67. Asia Pacific Next-generation X-in-1 Electric Powertrain Sales Market Share

by Region in 2024

Figure 68. Asia Pacific Next-generation X-in-1 Electric Powertrain Market Size by Region in 2024

Figure 69. China Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 70. China Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 71. Japan Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 72. Japan Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 73. South Korea Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 74. South Korea Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 75. India Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 76. India Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 77. Southeast Asia Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 78. Southeast Asia Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 79. South America Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (K Units)

Figure 80. South America Next-generation X-in-1 Electric Powertrain Sales Market Share by Country in 2024

Figure 81. South America Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (M USD)

Figure 82. South America Next-generation X-in-1 Electric Powertrain Market Size by Country in 2024

Figure 83. Brazil Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 84. Brazil Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 85. Argentina Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 86. Argentina Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 87. Columbia Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 88. Columbia Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 89. Middle East and Africa Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (K Units)

Figure 90. Middle East and Africa Next-generation X-in-1 Electric Powertrain Sales Market Share by Region in 2024

Figure 91. Middle East and Africa Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (M USD)

Figure 92. Middle East and Africa Next-generation X-in-1 Electric Powertrain Market Size by Region in 2024

Figure 93. Saudi Arabia Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 94. Saudi Arabia Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 95. UAE Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 96. UAE Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 97. Egypt Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 98. Egypt Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 99. Nigeria Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 100. Nigeria Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 101. South Africa Next-generation X-in-1 Electric Powertrain Sales and Growth Rate (2020-2025) & (K Units)

Figure 102. South Africa Next-generation X-in-1 Electric Powertrain Market Size and Growth Rate (2020-2025) & (M USD)

Figure 103. Global Next-generation X-in-1 Electric Powertrain Production Market Share by Region (2020-2025)

Figure 104. North America Next-generation X-in-1 Electric Powertrain Production (K Units) Growth Rate (2020-2025)

Figure 105. Europe Next-generation X-in-1 Electric Powertrain Production (K Units) Growth Rate (2020-2025)

Figure 106. Japan Next-generation X-in-1 Electric Powertrain Production (K Units)

Growth Rate (2020-2025)

Figure 107. China Next-generation X-in-1 Electric Powertrain Production (K Units)

Growth Rate (2020-2025)

Figure 108. Global Next-generation X-in-1 Electric Powertrain Sales Forecast by Volume (2020-2035) & (K Units)

Figure 109. Global Next-generation X-in-1 Electric Powertrain Market Size Forecast by Value (2020-2035) & (M USD)

Figure 110. Global Next-generation X-in-1 Electric Powertrain Sales Market Share Forecast by Type (2026-2035)

Figure 111. Global Next-generation X-in-1 Electric Powertrain Market Share Forecast by Type (2026-2035)

Figure 112. Global Next-generation X-in-1 Electric Powertrain Sales Forecast by Application (2026-2035)

Figure 113. Global Next-generation X-in-1 Electric Powertrain Market Share Forecast by Application (2026-2035)

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