

# Global 48V Mild Hybrid Battery Pack System Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G50C7CA9A1DCEN.html>

Date: June 2026

Pages: 121

Price: US\$ 4,480.00 (Single User License)

ID: G50C7CA9A1DCEN

## Abstracts

The global 48V Mild Hybrid Battery Pack System market size is expected to reach \$ 4924 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

48V mild hybrid battery pack systems are lithium-ion battery systems designed specifically for mild hybrid electric vehicles (MHEVs), operating at a nominal voltage of 48 volts. These battery packs serve as the core energy storage component in 48V mild hybrid architectures, enabling functions including start-stop, torque assist, regenerative braking, electric boosting, and power supply for electrically driven accessories. Unlike high-voltage batteries in full hybrids or BEVs, 48V systems offer a cost-effective electrification solution that requires minimal modification to existing vehicle platforms while delivering measurable improvements in fuel efficiency (typically 10-15%) and CO<sub>2</sub> emission reduction. Key battery chemistries include Lithium-ion NMC (dominant with ~48% share), LFP, and NCA variants. From a value chain perspective, upstream includes lithium, nickel, cobalt, manganese raw material suppliers, cell manufacturers, and BMS chip providers; midstream involves battery pack assembly, thermal management integration (passive, air, liquid cooling), and quality testing; downstream demand spans automotive OEMs, 48V system integrators (P0-P4 architectures), and powertrain suppliers. In 2025, the average selling price is approximately US\$1,710 per unit, global sales volume is about 1,890k units, and gross margins generally range from 25% to 40%, driven by raw material costs (lithium, nickel, cobalt), cell manufacturing complexity, BMS sophistication, and thermal management requirements.

The 48V mild hybrid battery pack system market is experiencing robust growth driven by the global automotive industry's transition toward mild hybridization as a cost-effective pathway to meet tightening emission regulations. Unlike full hybrid or battery

electric systems that require significant platform redesign, 48V architectures offer an optimal balance between performance improvement, fuel efficiency gains, and cost-effectiveness, enabling automakers to comply with stringent CO<sub>2</sub> standards while maintaining affordability for mass-market vehicles. This makes 48V systems a practical electrification bridge, extending the relevance of internal combustion engine platforms while delivering measurable environmental benefits.

Another key trend is the increasing share of NMC (Lithium Nickel Manganese Cobalt Oxide) chemistry in 48V battery packs, which is projected to lead with approximately 48% market share due to its superior energy density and power output characteristics. However, LFP (Lithium Iron Phosphate) chemistry is gaining traction in cost-sensitive applications, offering improved safety and longer cycle life at a lower cost point, albeit with slightly lower energy density. The choice of chemistry significantly impacts battery pack performance, cost structure, and thermal management requirements.

The market is also witnessing ongoing advances in battery energy density, lifespan extension, and integrated thermal management solutions. Liquid cooling systems are increasingly adopted in premium and performance vehicle segments, while passive and air cooling solutions dominate entry-level applications. The continued development of more compact battery pack designs, along with cost optimization through scaled manufacturing and improved material sourcing, will further accelerate 48V adoption across vehicle segments worldwide.

This report studies the global 48V Mild Hybrid Battery Pack System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for 48V Mild Hybrid Battery Pack System and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of 48V Mild Hybrid Battery Pack System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global 48V Mild Hybrid Battery Pack System total production and demand, 2021-2032, (K Units)

Global 48V Mild Hybrid Battery Pack System total production value, 2021-2032, (USD Million)

Global 48V Mild Hybrid Battery Pack System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production

site)

Global 48V Mild Hybrid Battery Pack System consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: 48V Mild Hybrid Battery Pack System domestic production, consumption, key domestic manufacturers and share

Global 48V Mild Hybrid Battery Pack System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global 48V Mild Hybrid Battery Pack System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global 48V Mild Hybrid Battery Pack System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global 48V Mild Hybrid Battery Pack System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Robert Bosch GmbH, Valeo SA, Hella GmbH & Co. KGaA, Hitachi Astemo, Ltd., MAHLE GmbH, Samsung SDI Co., Ltd., LG Energy Solution, Ltd., Panasonic Corporation, Vitesco Technologies GmbH, A123 Systems LLC, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World 48V Mild Hybrid Battery Pack System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global 48V Mild Hybrid Battery Pack System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global 48V Mild Hybrid Battery Pack System Market, Segmentation by Type:

Lithium-ion NMC (Nickel Manganese Cobalt)

Lithium-ion LFP (Lithium Iron Phosphate)

Lithium-ion NCA (Nickel Cobalt Aluminum)

Other Chemistries

Global 48V Mild Hybrid Battery Pack System Market, Segmentation by Architecture:

P0 System (Belt-integrated starter generator)

P1 System (Crank-integrated motor generator)

P2 System (Motor between engine and transmission)

P3 System (Motor after transmission)

P4 System (Motor on rear axle)

Global 48V Mild Hybrid Battery Pack System Market, Segmentation by Capacity Range:

Below 10 Ah

10-15 Ah

More than 15 Ah

Global 48V Mild Hybrid Battery Pack System Market, Segmentation by Application:

Passenger Cars

Commercial Vehicle

Companies Profiled:

Robert Bosch GmbH

Valeo SA

Hella GmbH & Co. KGaA

Hitachi Astemo, Ltd.

MAHLE GmbH

Samsung SDI Co., Ltd.

LG Energy Solution, Ltd.

Panasonic Corporation

Vitesco Technologies GmbH

A123 Systems LLC

Contemporary Amperex Technology Co., Limited (CATL)

CALB Group Co., Ltd.

Vision Group (Vision Battery)

Beijing Pride Power Battery Technology Co., Ltd.

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Key Questions Answered:

1. How big is the global 48V Mild Hybrid Battery Pack System market?
2. What is the demand of the global 48V Mild Hybrid Battery Pack System market?
3. What is the year over year growth of the global 48V Mild Hybrid Battery Pack System market?
4. What is the production and production value of the global 48V Mild Hybrid Battery Pack System market?
5. Who are the key producers in the global 48V Mild Hybrid Battery Pack System market?
6. What are the growth factors driving the market demand?

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