

Global 48V Mild Hybrid Battery Pack System Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global 48V Mild Hybrid Battery Pack System market size was valued at US\$ 3325 million in 2025 and is forecast to a readjusted size of US\$ 4924 million by 2032 with a CAGR of 5.7% during review period.

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 CO₂ 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 CO₂ 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 is a detailed and comprehensive analysis for global 48V Mild Hybrid Battery Pack System market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global 48V Mild Hybrid Battery Pack System market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global 48V Mild Hybrid Battery Pack System market size and forecasts by region and

country, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global 48V Mild Hybrid Battery Pack System market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

Global 48V Mild Hybrid Battery Pack System market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for 48V Mild Hybrid Battery Pack System

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global 48V Mild Hybrid Battery Pack System market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

48V Mild Hybrid Battery Pack System market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Lithium-ion NMC (Nickel Manganese Cobalt)

Lithium-ion LFP (Lithium Iron Phosphate)

Lithium-ion NCA (Nickel Cobalt Aluminum)

Other Chemistries

Market segment 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)

Market segment by Capacity Range

Below 10 Ah

10-15 Ah

More than 15 Ah

Market segment by Application

Passenger Cars

Commercial Vehicle

Major players covered

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.

Leclanché S.A.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe 48V Mild Hybrid Battery Pack System product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of 48V Mild Hybrid Battery Pack System, with price, sales quantity, revenue, and global market share of 48V Mild Hybrid Battery Pack System from 2021 to 2026.

Chapter 3, the 48V Mild Hybrid Battery Pack System competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the 48V Mild Hybrid Battery Pack System breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and 48V Mild Hybrid Battery Pack System market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of 48V Mild

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Chapter 14 and 15, to describe 48V Mild Hybrid Battery Pack System sales channel, distributors, customers, research findings and conclusion.

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