

Global Hybrid Electric Powertrain Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hybrid Electric Powertrain market size is expected to reach \$ 76395 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

Hybrid Electric Powertrain is a vehicle propulsion system that combines an internal combustion engine, usually gasoline or diesel, with one or more electric motors, a battery pack, power electronics, and a control system. Its purpose is to improve fuel efficiency, reduce emissions, recover braking energy, and provide better driving performance compared with a conventional engine-only powertrain.

In a hybrid electric powertrain, the engine and electric motor can work separately or together depending on driving conditions. At low speed or during light-load driving, the vehicle may use electric power to reduce fuel consumption. During acceleration or climbing, the electric motor can assist the engine to provide extra torque. During braking, the system can recover kinetic energy through regenerative braking and store it in the battery.

2025, global Hybrid Electric Powertrain sales volume reached 10.6 million units, with average price of 4.8 k US\$ per unit.

Hybrid electric powertrains are gaining renewed importance as a bridge between internal-combustion vehicles and full battery-electric vehicles. In many markets, consumers still face concerns around EV purchase price, charging infrastructure, driving range, and battery replacement cost, so HEV and mild-hybrid systems offer a practical middle path by improving fuel economy without requiring external charging. In Europe, hybrid-electric models accounted for 34.5% of EU new car registrations in 2025, making

them the largest individual powertrain category, while S&P Global Mobility describes hybrids as gaining ground in 2026 as part of a 'multi-track' electrification path.

Technology development is moving toward higher efficiency, stronger electric assist, and more integrated hybrid systems. Automakers are upgrading hybrid electric powertrains through more efficient engines, compact e-motors, high-efficiency inverters, improved battery management, regenerative braking optimization, e-CVT or dedicated hybrid transmissions, and smarter control software. The trend is not only toward full hybrids, but also toward 48V mild hybrids that provide start-stop, torque assist, coasting, and energy recovery at lower system cost. This makes hybrid technology attractive for passenger cars, SUVs, light commercial vehicles, and markets where emissions rules are tightening but BEV penetration remains uneven.

This report studies the global Hybrid Electric Powertrain demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Hybrid Electric Powertrain, 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 Hybrid Electric Powertrain that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Hybrid Electric Powertrain total market, 2021-2032, (USD Million)

Global Hybrid Electric Powertrain total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Hybrid Electric Powertrain total market, key domestic companies, and share, (USD Million)

Global Hybrid Electric Powertrain revenue by player, revenue and market share 2021-2026, (USD Million)

Global Hybrid Electric Powertrain total market by Type, CAGR, 2021-2032, (USD Million)

Global Hybrid Electric Powertrain total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Hybrid Electric Powertrain market based on the following parameters - company overview, revenue, gross margin, product

portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Toyota, Honda, Hyundai Motor, Kia Corporation, Nissan, Renault Group, Ford, Stellantis, 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 Hybrid Electric Powertrain market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Hybrid Electric Powertrain Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Hybrid Electric Powertrain Market, Segmentation by Type:

Series HEV Powertrain

Parallel HEV Powertrain

Other

Global Hybrid Electric Powertrain Market, Segmentation by hybridization level:

Micro Hybrid

Mild Hybrid

Full Hybrid

Global Hybrid Electric Powertrain Market, Segmentation by voltage platform:

12V Hybrid

48V Mild Hybrid

High-Voltage Full Hybrid

Global Hybrid Electric Powertrain Market, Segmentation by Application:

Passenger Cars

Commercial Vehicles

Companies Profiled:

Toyota

Honda

Hyundai Motor

Kia Corporation

Nissan

Renault Group

Ford

Stellantis

Key Questions Answered

1. How big is the global Hybrid Electric Powertrain market?
2. What is the demand of the global Hybrid Electric Powertrain market?
3. What is the year over year growth of the global Hybrid Electric Powertrain market?
4. What is the total value of the global Hybrid Electric Powertrain market?
5. Who are the Major Players in the global Hybrid Electric Powertrain market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Hybrid Electric Powertrain Introduction
- 1.2 World Hybrid Electric Powertrain Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Hybrid Electric Powertrain Total Market by Region (by Headquarter Location)
 - 1.3.1 World Hybrid Electric Powertrain Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Hybrid Electric Powertrain Revenue (2021-2032)
 - 1.3.3 China Based Company Hybrid Electric Powertrain Revenue (2021-2032)
 - 1.3.4 Europe Based Company Hybrid Electric Powertrain Revenue (2021-2032)
 - 1.3.5 Japan Based Company Hybrid Electric Powertrain Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Hybrid Electric Powertrain Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Hybrid Electric Powertrain Revenue (2021-2032)
 - 1.3.8 India Based Company Hybrid Electric Powertrain Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Hybrid Electric Powertrain Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.2 World Hybrid Electric Powertrain Consumption Value by Region
 - 2.2.1 World Hybrid Electric Powertrain Consumption Value by Region (2021-2026)
 - 2.2.2 World Hybrid Electric Powertrain Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.4 China Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.5 Europe Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.6 Japan Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.7 South Korea Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.8 ASEAN Hybrid Electric Powertrain Consumption Value (2021-2032)
- 2.9 India Hybrid Electric Powertrain Consumption Value (2021-2032)

3 WORLD HYBRID ELECTRIC POWERTRAIN COMPANIES COMPETITIVE ANALYSIS

- 3.1 World Hybrid Electric Powertrain Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global Hybrid Electric Powertrain Industry Rank of Major Players
 - 3.2.2 Global Concentration Ratios (CR4) for Hybrid Electric Powertrain in 2025
 - 3.2.3 Global Concentration Ratios (CR8) for Hybrid Electric Powertrain in 2025
- 3.3 Hybrid Electric Powertrain Company Evaluation Quadrant
- 3.4 Hybrid Electric Powertrain Market: Overall Company Footprint Analysis
 - 3.4.1 Hybrid Electric Powertrain Market: Region Footprint
 - 3.4.2 Hybrid Electric Powertrain Market: Company Product Type Footprint
 - 3.4.3 Hybrid Electric Powertrain Market: Company Product Application Footprint
- 3.5 Competitive Environment
 - 3.5.1 Historical Structure of the Industry
 - 3.5.2 Barriers of Market Entry
 - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

- 4.1 United States VS China: Hybrid Electric Powertrain Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: Hybrid Electric Powertrain Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: Hybrid Electric Powertrain Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: Hybrid Electric Powertrain Consumption Value Comparison
 - 4.2.1 United States VS China: Hybrid Electric Powertrain Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Hybrid Electric Powertrain Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based Hybrid Electric Powertrain Companies and Market Share, 2021-2026
 - 4.3.1 United States Based Hybrid Electric Powertrain Companies, Headquarters (States, Country)
 - 4.3.2 United States Based Companies Hybrid Electric Powertrain Revenue, (2021-2026)
- 4.4 China Based Companies Hybrid Electric Powertrain Revenue and Market Share, 2021-2026

4.4.1 China Based Hybrid Electric Powertrain Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Hybrid Electric Powertrain Revenue, (2021-2026)

4.5 Rest of World Based Hybrid Electric Powertrain Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Hybrid Electric Powertrain Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Hybrid Electric Powertrain Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Hybrid Electric Powertrain Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Series HEV Powertrain

5.2.2 Parallel HEV Powertrain

5.2.3 Other

5.3 Market Segment by Type

5.3.1 World Hybrid Electric Powertrain Market Size by Type (2021-2026)

5.3.2 World Hybrid Electric Powertrain Market Size by Type (2027-2032)

5.3.3 World Hybrid Electric Powertrain Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY HYBRIDIZATION LEVEL

6.1 World Hybrid Electric Powertrain Market Size Overview by hybridization level: 2021 VS 2025 VS 2032

6.2 Segment Introduction by hybridization level

6.2.1 Micro Hybrid

6.2.2 Mild Hybrid

6.2.3 Full Hybrid

6.3 Market Segment by hybridization level

6.3.1 World Hybrid Electric Powertrain Market Size by hybridization level (2021-2026)

6.3.2 World Hybrid Electric Powertrain Market Size by hybridization level (2027-2032)

6.3.3 World Hybrid Electric Powertrain Market Size Market Share by hybridization level (2027-2032)

7 MARKET ANALYSIS BY VOLTAGE PLATFORM

7.1 World Hybrid Electric Powertrain Market Size Overview by voltage platform: 2021 VS 2025 VS 2032

7.2 Segment Introduction by voltage platform

7.2.1 12V Hybrid

7.2.2 48V Mild Hybrid

7.2.3 High-Voltage Full Hybrid

7.3 Market Segment by voltage platform

7.3.1 World Hybrid Electric Powertrain Market Size by voltage platform (2021-2026)

7.3.2 World Hybrid Electric Powertrain Market Size by voltage platform (2027-2032)

7.3.3 World Hybrid Electric Powertrain Market Size Market Share by voltage platform (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Hybrid Electric Powertrain Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Passenger Cars

8.2.2 Commercial Vehicles

8.3 Market Segment by Application

8.3.1 World Hybrid Electric Powertrain Market Size by Application (2021-2026)

8.3.2 World Hybrid Electric Powertrain Market Size by Application (2027-2032)

8.3.3 World Hybrid Electric Powertrain Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Toyota

9.1.1 Toyota Details

9.1.2 Toyota Major Business

9.1.3 Toyota Hybrid Electric Powertrain Product and Services

9.1.4 Toyota Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026)

9.1.5 Toyota Recent Developments/Updates

9.1.6 Toyota Competitive Strengths & Weaknesses

9.2 Honda

9.2.1 Honda Details

9.2.2 Honda Major Business

9.2.3 Honda Hybrid Electric Powertrain Product and Services

9.2.4 Honda Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026)

9.2.5 Honda Recent Developments/Updates

9.2.6 Honda Competitive Strengths & Weaknesses

9.3 Hyundai Motor

9.3.1 Hyundai Motor Details

9.3.2 Hyundai Motor Major Business

9.3.3 Hyundai Motor Hybrid Electric Powertrain Product and Services

9.3.4 Hyundai Motor Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026)

9.3.5 Hyundai Motor Recent Developments/Updates

9.3.6 Hyundai Motor Competitive Strengths & Weaknesses

9.4 Kia Corporation

9.4.1 Kia Corporation Details

9.4.2 Kia Corporation Major Business

9.4.3 Kia Corporation Hybrid Electric Powertrain Product and Services

9.4.4 Kia Corporation Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026)

9.4.5 Kia Corporation Recent Developments/Updates

9.4.6 Kia Corporation Competitive Strengths & Weaknesses

9.5 Nissan

9.5.1 Nissan Details

9.5.2 Nissan Major Business

9.5.3 Nissan Hybrid Electric Powertrain Product and Services

9.5.4 Nissan Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026)

9.5.5 Nissan Recent Developments/Updates

9.5.6 Nissan Competitive Strengths & Weaknesses

9.6 Renault Group

9.6.1 Renault Group Details

9.6.2 Renault Group Major Business

9.6.3 Renault Group Hybrid Electric Powertrain Product and Services

9.6.4 Renault Group Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026)

9.6.5 Renault Group Recent Developments/Updates

9.6.6 Renault Group Competitive Strengths & Weaknesses

9.7 Ford

9.7.1 Ford Details

9.7.2 Ford Major Business

9.7.3 Ford Hybrid Electric Powertrain Product and Services

9.7.4 Ford Hybrid Electric Powertrain Revenue, Gross Margin and Market Share
(2021-2026)

9.7.5 Ford Recent Developments/Updates

9.7.6 Ford Competitive Strengths & Weaknesses

9.8 Stellantis

9.8.1 Stellantis Details

9.8.2 Stellantis Major Business

9.8.3 Stellantis Hybrid Electric Powertrain Product and Services

9.8.4 Stellantis Hybrid Electric Powertrain Revenue, Gross Margin and Market Share
(2021-2026)

9.8.5 Stellantis Recent Developments/Updates

9.8.6 Stellantis Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Hybrid Electric Powertrain Industry Chain

10.2 Hybrid Electric Powertrain Upstream Analysis

10.3 Hybrid Electric Powertrain Midstream Analysis

10.4 Hybrid Electric Powertrain Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Hybrid Electric Powertrain Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Hybrid Electric Powertrain Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Hybrid Electric Powertrain Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Hybrid Electric Powertrain Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Hybrid Electric Powertrain Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Hybrid Electric Powertrain Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Hybrid Electric Powertrain Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Hybrid Electric Powertrain Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Hybrid Electric Powertrain Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Hybrid Electric Powertrain Players in 2025

Table 12. World Hybrid Electric Powertrain Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Hybrid Electric Powertrain Company Evaluation Quadrant

Table 14. Head Office of Key Hybrid Electric Powertrain Players

Table 15. Hybrid Electric Powertrain Market: Company Product Type Footprint

Table 16. Hybrid Electric Powertrain Market: Company Product Application Footprint

Table 17. Hybrid Electric Powertrain Mergers & Acquisitions Activity

Table 18. United States VS China Hybrid Electric Powertrain Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Hybrid Electric Powertrain Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Hybrid Electric Powertrain Companies, Headquarters (States, Country)

Table 21. United States Based Companies Hybrid Electric Powertrain Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Hybrid Electric Powertrain Revenue Market Share (2021-2026)

Table 23. China Based Hybrid Electric Powertrain Companies, Headquarters (Province, Country)

Table 24. China Based Companies Hybrid Electric Powertrain Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Hybrid Electric Powertrain Revenue Market Share (2021-2026)

Table 26. Rest of World Based Hybrid Electric Powertrain Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Hybrid Electric Powertrain Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Hybrid Electric Powertrain Revenue Market Share (2021-2026)

Table 29. World Hybrid Electric Powertrain Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Hybrid Electric Powertrain Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Hybrid Electric Powertrain Market Size by Type (2027-2032) & (USD Million)

Table 32. World Hybrid Electric Powertrain Market Size by hybridization level, (USD Million), 2021 & 2025 & 2032

Table 33. World Hybrid Electric Powertrain Market Size Value by hybridization level (2021-2026) & (USD Million)

Table 34. World Hybrid Electric Powertrain Market Size by hybridization level (2027-2032) & (USD Million)

Table 35. World Hybrid Electric Powertrain Market Size by voltage platform, (USD Million), 2021 & 2025 & 2032

Table 36. World Hybrid Electric Powertrain Market Size Value by voltage platform (2021-2026) & (USD Million)

Table 37. World Hybrid Electric Powertrain Market Size by voltage platform (2027-2032) & (USD Million)

Table 38. World Hybrid Electric Powertrain Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Hybrid Electric Powertrain Market Size by Application (2021-2026) & (USD Million)

Table 40. World Hybrid Electric Powertrain Market Size by Application (2027-2032) & (USD Million)

Table 41. Toyota Basic Information, Manufacturing Base and Competitors

Table 42. Toyota Major Business
Table 43. Toyota Hybrid Electric Powertrain Product and Services
Table 44. Toyota Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Toyota Recent Developments/Updates
Table 46. Toyota Competitive Strengths & Weaknesses
Table 47. Honda Basic Information, Manufacturing Base and Competitors
Table 48. Honda Major Business
Table 49. Honda Hybrid Electric Powertrain Product and Services
Table 50. Honda Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Honda Recent Developments/Updates
Table 52. Honda Competitive Strengths & Weaknesses
Table 53. Hyundai Motor Basic Information, Manufacturing Base and Competitors
Table 54. Hyundai Motor Major Business
Table 55. Hyundai Motor Hybrid Electric Powertrain Product and Services
Table 56. Hyundai Motor Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Hyundai Motor Recent Developments/Updates
Table 58. Hyundai Motor Competitive Strengths & Weaknesses
Table 59. Kia Corporation Basic Information, Manufacturing Base and Competitors
Table 60. Kia Corporation Major Business
Table 61. Kia Corporation Hybrid Electric Powertrain Product and Services
Table 62. Kia Corporation Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Kia Corporation Recent Developments/Updates
Table 64. Kia Corporation Competitive Strengths & Weaknesses
Table 65. Nissan Basic Information, Manufacturing Base and Competitors
Table 66. Nissan Major Business
Table 67. Nissan Hybrid Electric Powertrain Product and Services
Table 68. Nissan Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Nissan Recent Developments/Updates
Table 70. Nissan Competitive Strengths & Weaknesses
Table 71. Renault Group Basic Information, Manufacturing Base and Competitors
Table 72. Renault Group Major Business
Table 73. Renault Group Hybrid Electric Powertrain Product and Services
Table 74. Renault Group Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. Renault Group Recent Developments/Updates
Table 76. Renault Group Competitive Strengths & Weaknesses
Table 77. Ford Basic Information, Manufacturing Base and Competitors
Table 78. Ford Major Business
Table 79. Ford Hybrid Electric Powertrain Product and Services
Table 80. Ford Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Ford Recent Developments/Updates
Table 82. Ford Competitive Strengths & Weaknesses
Table 83. Stellantis Basic Information, Manufacturing Base and Competitors
Table 84. Stellantis Major Business
Table 85. Stellantis Hybrid Electric Powertrain Product and Services
Table 86. Stellantis Hybrid Electric Powertrain Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Stellantis Recent Developments/Updates
Table 88. Stellantis Competitive Strengths & Weaknesses
Table 89. Global Key Players of Hybrid Electric Powertrain Upstream (Raw Materials)
Table 90. Global Hybrid Electric Powertrain Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Hybrid Electric Powertrain Picture

Figure 2. World Hybrid Electric Powertrain Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Hybrid Electric Powertrain Total Revenue (2021-2032) & (USD Million)

Figure 4. World Hybrid Electric Powertrain Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Hybrid Electric Powertrain Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Hybrid Electric Powertrain Revenue (2021-2032) & (USD Million)

Figure 13. Hybrid Electric Powertrain Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 16. World Hybrid Electric Powertrain Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 18. China Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Million)

Figure 21. South Korea Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 23. India Hybrid Electric Powertrain Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Hybrid Electric Powertrain by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Hybrid Electric Powertrain Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Hybrid Electric Powertrain Markets in 2025

Figure 27. United States VS China: Hybrid Electric Powertrain Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Hybrid Electric Powertrain Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Hybrid Electric Powertrain Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Hybrid Electric Powertrain Market Size Market Share by Type in 2025

Figure 31. Series HEV Powertrain

Figure 32. Parallel HEV Powertrain

Figure 33. Other

Figure 34. World Hybrid Electric Powertrain Market Size Market Share by Type (2021-2032)

Figure 35. World Hybrid Electric Powertrain Market Size by hybridization level, (USD Million), 2021 & 2025 & 2032

Figure 36. World Hybrid Electric Powertrain Market Size Market Share by hybridization level in 2025

Figure 37. Micro Hybrid

Figure 38. Mild Hybrid

Figure 39. Full Hybrid

Figure 40. World Hybrid Electric Powertrain Market Size Market Share by hybridization level (2021-2032)

Figure 41. World Hybrid Electric Powertrain Market Size by voltage platform, (USD Million), 2021 & 2025 & 2032

Figure 42. World Hybrid Electric Powertrain Market Size Market Share by voltage platform in 2025

Figure 43. 12V Hybrid

Figure 44. 48V Mild Hybrid

Figure 45. High-Voltage Full Hybrid

Figure 46. World Hybrid Electric Powertrain Market Size Market Share by voltage platform (2021-2032)

Figure 47. World Hybrid Electric Powertrain Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 48. World Hybrid Electric Powertrain Market Size Market Share by Application in 2025

Figure 49. Passenger Cars

Figure 50. Commercial Vehicles

Figure 51. World Hybrid Electric Powertrain Market Size Market Share by Application (2021-2032)

Figure 52. Hybrid Electric Powertrain Industrial Chain

Figure 53. Methodology

Figure 54. Research Process and Data Source

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