

Global Mild-Hybrid Vehicles Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GEF2E1750E5EEN.html>

Date: September 2026

Pages: 173

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

ID: GEF2E1750E5EEN

Abstracts

The global Mild-Hybrid Vehicles market size is expected to reach \$ 556743 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

In 2025, global Mild-Hybrid Vehicle output reached about 15 million units and global capacity of around 20 million units. The average price is about USD 21,000 per unit, with gross margins near 18%. Mild-Hybrid Vehicles (MHEVs) are internal combustion engine (ICE) vehicles equipped with a low-voltage (typically 48V) or high-voltage electrical system that integrates a compact electric motor/generator and a small rechargeable battery to assist the engine during start-stop operation, acceleration, regenerative braking, and energy recovery, while the electric motor cannot independently propel the vehicle under normal driving conditions. Compared with conventional ICE vehicles, MHEVs offer improved fuel efficiency, lower CO₂ emissions, smoother engine restarts, and enhanced driving performance without requiring external charging infrastructure. The Mild-Hybrid Vehicle supply chain begins with the extraction and processing of raw materials such as steel, aluminum, copper, rare earth elements, lithium, graphite, and semiconductor materials, followed by the production of key components including internal combustion engines, 48V battery packs, battery management systems (BMS), belt-driven or crankshaft-integrated starter generators (BSG/ISG), DC/DC converters, inverters, power electronics, electric motors, transmission systems, ECUs, sensors, and wiring harnesses. These components are supplied by Tier 1 automotive suppliers and integrated by vehicle manufacturers (OEMs), after which the finished vehicles are distributed through dealer networks and fleet channels for use in passenger cars, SUVs, light commercial vehicles, and selected commercial vehicle applications, with ongoing support from aftermarket service providers, battery replacement suppliers, software update providers, and vehicle maintenance networks throughout the vehicle lifecycle.

The Mild-Hybrid Vehicles (MHEVs) market is experiencing steady growth, driven by increasingly stringent global fuel economy and CO₂ emission regulations, growing consumer demand for fuel-efficient yet affordable vehicles, and automakers' need for cost-effective electrification solutions that require minimal changes to existing internal combustion engine platforms. Compared with full hybrid and battery electric vehicles, MHEVs offer lower manufacturing costs, no dependence on external charging infrastructure, and easier integration into existing vehicle architectures, making them an attractive transition technology for both developed and emerging markets. Rising adoption of 48V electrical systems, advances in lithium-ion battery technology, high-efficiency integrated starter generators (ISGs), power electronics, and energy management software are further improving vehicle performance and fuel savings. Demand is also being supported by expanding production of premium passenger vehicles, SUVs, and light commercial vehicles, increasing investments by global OEMs and Tier 1 suppliers in electrified powertrains, and favorable regulatory incentives promoting lower-emission vehicles. Additionally, the rapid integration of advanced driver assistance systems (ADAS), connected vehicle technologies, and electrified auxiliary components that benefit from 48V architectures is expected to accelerate MHEV adoption, positioning the segment as an important bridge between conventional internal combustion vehicles and fully electrified mobility.

Report Scope

This report studies the global Mild-Hybrid Vehicles production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Mild-Hybrid Vehicles total production and demand, 2021-2032, (Units)

Global Mild-Hybrid Vehicles total production value, 2021-2032, (USD Million)

Global Mild-Hybrid Vehicles production by region & country, production, value,

CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Mild-Hybrid Vehicles consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Mild-Hybrid Vehicles domestic production, consumption, key domestic manufacturers and share

Global Mild-Hybrid Vehicles production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Mild-Hybrid Vehicles production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Mild-Hybrid Vehicles production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Mild-Hybrid Vehicles 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 Toyota, Nissan, Suzuki, Mazda, Hyundai, Kia, Mercedes-Benz, BMW, Audi, Volkswagen, 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 Mild-Hybrid Vehicles market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 Mild-Hybrid Vehicles Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mild-Hybrid Vehicles Market, Segmentation by Type:

Lithium-ion (Li-ion) Type

Nickel Metal Hydride (NiMH) Type

Global Mild-Hybrid Vehicles Market, Segmentation by Electrical System Voltage:

12V Mild Hybrid

24V Mild Hybrid

48V Mild Hybrid

Global Mild-Hybrid Vehicles Market, Segmentation by Motor Configuration:

Belt Starter Generator (BSG)

Crankshaft Integrated Starter Generator (C-ISG)

Transmission Integrated Motor (P2 Hybrid)

Global Mild-Hybrid Vehicles Market, Segmentation by Application:

Passenger Vehicles

Commercial Fleets

Others

Companies Profiled:

Toyota

Nissan

Suzuki

Mazda

Hyundai

Kia

Mercedes-Benz

BMW

Audi

Volkswagen

Porsche

Volvo

Jaguar

Stellantis

Renault

Alfa Romeo

Jeep

Ford

Chery

Geely

Great Wall Motor

BAIC Group

SAIC Motor

Dongfeng Motor

GAC Group

Key Questions Answered:

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

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