

Automotive 48V System Market Report by Architecture (Belt Driven (P0), Crankshaft Mounted (P1), Dual-Clutch Transmission-Mounted/Input Shaft of Transmission (P2/P3), Transmission Output Shaft/Rear Axle (P4)), Vehicle Class (Entry-level, Mid-range, Premium, Luxury), and Region ?2025-2033?

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Abstracts

The global automotive 48V system market size reached USD 8.5 Billion in 2024. Looking forward, IMARC Group expects the market to reach USD 43.8 Billion by 2033, exhibiting a growth rate (CAGR) of 18.96% during 2025-2033. The market is witnessing substantial expansion, boosted by rising demand for reduced emissions and fuel efficiency, coupled with innovations in electric vehicle technology. At present, Asia-Pacific holds the largest market share, attributed to technological innovations, escalating vehicle production, and strict environmental policies.

The automotive 48V system is an advanced technology that integrates a 48-volt battery with an internal combustion (IC) engine and a regular 12-volt battery in multiple configurations. It includes various components, such as a belt alternator starter, direct current (DC)-to-DC converter, high voltage battery, inverter, power distribution box, electric motor, and charger. The automotive 48V system is widely used to provide start-stop function, torque boost, regenerative braking, and power to the electric drive, compressors, and power steering. It aids in optimizing performance, reducing weight, and improving the harness packaging in the vehicle. The automotive 48V system helps to reduce carbon dioxide emissions, improve fuel efficiency, and enable dynamic handling and performance.

Automotive 48V System Market Trends:

The escalating demand for electric and hybrid vehicles is one of the primary factors driving the market growth. An automotive 48V system is widely used in electric vehicles (EVs) to power various electrical components, such as lighting systems, electrical heaters, air conditioning compressors, pumps, and steering drives. In addition to this, the widespread product adoption to provide mild-hybrid functionality to vehicles by powering auxiliary systems, which, in turn, improves the thermal performance of the engine, reduces emissions, enhances fuel efficiency, and saves cost, is acting as another growth-inducing factor. Furthermore, rising product application to power luxury and advanced safety features in vehicles, such as heated seats, windows demister, infotainment systems, reverse cameras, blind-spot monitoring, road condition sensors, motion detectors, and adaptive cruise control, is providing an impetus to the market growth. Additionally, the widespread product utilization for the development of autonomous vehicles to power energy-intensive components, such as computers, cameras, and various sensors, is positively influencing the market growth. Moreover, the implementation of various government initiatives to promote the adoption of EVs and subsequently reduce greenhouse gas emissions is favoring the market growth. Other factors, including rising expenditure capacities of consumers, increasing environmental concerns, significant investment in research and development (R&D) activities, the escalating demand for fuel-efficient vehicles, and increasing awareness among consumers regarding various product benefits, such as lower cost, higher performance, and improved vehicle speed, are anticipated to drive the market growth.

Key Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global automotive 48V system market, along with forecasts at the global, regional, and country level from 2025-2033. Our report has categorized the market based on architecture and vehicle class.

Architecture Insights:

Belt Driven (P0)

Crankshaft Mounted (P1)

Dual-Clutch Transmission-Mounted/Input Shaft of Transmission (P2/P3)

Transmission Output Shaft/Rear Axle (P4)

The report has also provided a detailed breakup and analysis of the automotive 48V system market based on the architecture. This includes belt driven (P0), crankshaft mounted (P1), dual-clutch transmission-mounted/Input shaft of transmission (P2/P3), and transmission output shaft/rear axle (P4). According to the report, belt driven represented the largest segment.

Vehicle Class Insights:

Entry-level

Mid-range

Premium

Luxury

A detailed breakup and analysis of the automotive 48V system market based on the vehicle class has been provided in the report. This includes entry-level, mid-range, premium, and luxury. According to the report, mid-range accounted for the largest market share.

Regional Insights:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

The report has also provided a comprehensive analysis of all the major regional markets that include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific was the largest market for automotive 48V systems. Some of the factors driving

the Asia Pacific automotive 48V system market include rising expenditure capacities of consumers, increasing penetration of international automotive manufacturers, and rising environmental concerns.

Competitive Landscape:

The report has also provided a comprehensive analysis of the competitive landscape in the global automotive 48V system market. Detailed profiles of all major companies have also been provided. Some of the companies covered include Borgwarner Inc., Continental Aktiengesellschaft, Dana Limited, Hyundai Motor Company, Magna International Inc., MAHLE GmbH (Mahle Stiftung GmbH), Mitsubishi Electric Corporation, Robert Bosch GmbH, Valeo, etc. Kindly note that this only represents a partial list of companies, and the complete list has been provided in the report.

Key Questions Answered in This Report

1. How big is the global automotive 48V system market?
2. What is the expected growth rate of the global automotive 48V system market during 2025-2033?
3. What are the key factors driving the global automotive 48V system market?
4. What has been the impact of COVID-19 on the global automotive 48V system market?
5. What is the breakup of the global automotive 48V system market based on the architecture?
6. What is the breakup of the global automotive 48V system market based on vehicle class?
7. What are the key regions in the global automotive 48V system market?
8. Who are the key players/companies in the global automotive 48V system market?

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