

# Global Electric Powertrain Market By Electric Vehicle Type (BEV and HEV/PHEV), By Component (Battery, Transmission, Converter, Power Electronics Controller, On-board Charger, Motor/Generator and Others), By Region, Industry Analysis and Forecast, 2020 - 2026

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### **Abstracts**

The Global Electric Powertrain Market size is expected to reach \$38.9 billion by 2026, rising at a market growth of 14.3% CAGR during the forecast period. EVs are the cornerstone of the automotive industry, since fossil fuels are predicted to be extinct over the coming decades. Alternative energy is then required to fuel cars, which could be electricity. Several countries have formulated strict policies on alternative fuel cars/EVs. Numerous regulations on pollution have been implemented to reduce CO2 emissions from vehicles. The EV can reduce CO2 emissions and also reduce fossil fuel consumption. The global demand for electric vehicle powertrains has expanded in the last few years. It is projected to accelerate further during the forecast period due to an increase in demand for electric vehicles on the global market. The shortage of infrastructure is a big limitation on the demand for electric powertrains.

Increased sales of electric vehicles, such as hybrid and pure electric vehicles, are a significant factor of demand expansion. High emission standards by government agencies, such as environmental requirements for greenhouse gas (GHG) emissions by the United States. The Environmental Protection Agency (EPA), China VI and BS-VI in India are driving the market. Moreover, the attractive incentives of governments for domestic production and the mass adoption of electric vehicles are expected to proliferate globally on the electric powertrain market.



The advent of BEVs and PHEVs would have a strong impact on the current and future adoption of the electric powertrain globally. Regulation on CO2 emissions in Europe and the United States is becoming more stringent. Europe has set its emission limits of 95 g/km by 2020 and a further 37.5 percent reduction by 2030, resulting in a limit of 59 g/km. North America has set emission limits of over 99 g/km following the Passenger Vehicle Corporate Average Fuel Economy (CAFE) standards for 2025. In order to reach the pollution standards and avoid penalties, more electrified vehicles will have to be marketed by OEMs in the coming years.

Based on Electric Vehicle Type, the market is segmented into BEV and HEV/PHEV. Based on Component, the market is segmented into Battery, Transmission, Converter, Power Electronics Controller, On-board Charger, Motor/Generator and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Partnerships and Product Launches. Based on the Analysis presented in the Cardinal matrix; Mitsubishi Electric Corporation, Magna International, Inc., Hitachi, Ltd., and Robert Bosch GmbH are the forerunners in the Electric Powertrain Market. Companies such as Schaeffler AG, ZF Friedrichshafen AG, Nidec Corporation, and BorgWarner, Inc., Valeo SA, and Continental AG are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Robert Bosch GmbH, Mitsubishi Electric Corporation, Magna International, Inc., ZF Friedrichshafen AG, Valeo SA, Nidec Corporation, Continental AG, Hitachi, Ltd., BorgWarner, Inc., and Schaeffler AG.

Recent strategies deployed in Electric Powertrain Market

Partnerships, Collaborations, and Agreements:

May-2020: ZF partnered with VisIC Technologies, a GaN power semiconductor device leader. Together, the companies were focused on creating the next generation of high-performance and high-efficiency electric drivelines for vehicles.

Dec-2019: Magna announced its collaboration with Italian OEM Ferrari following which the company has developed an all-new dual-clutch transmission. The 8-speed gearbox would be fitted to the 2020 SF90 Stradale. The next-generation DCT would offer improved torque and shifting while also reducing weight and emissions.

Dec-2019: Mitsubishi signed an alliance with Nissan Motor and Renault SA in which they will form a new joint venture company. This joint venture will be focused on the



research and development of advanced automotive technologies.

Nov-2019: ZF Friedrichshafen announced partnership with Cree, Inc., a US leader in silicon carbide semiconductors. Under this partnership, the companies were aimed to create industry-leading, highly efficient electric drivelines.

Oct-2019: Magna signed an agreement with BMW Group. Under this agreement, Magna aimed to provide transmission technologies including all front-wheel-drive dual-clutch transmissions to BMW Group.

Oct-2019: ZF became the official powertrain partner of Mahindra Racing. Under this partnership, the former company has been helping the latter company with the development of the electric drivetrain for the 2020-21 season of Formula E.

Oct-2019: Valeo came into collaboration with Dana to bring to market end-to-end 48V hybrid and electric vehicle systems. The systems provide all the components required to electrify light (three- and four-wheeled) urban vehicles and hybridize vehicles weighing up to 2.5 tons. They comprise an electric motor and an inverter, which acts as the brain of the electric vehicle.

Oct-2019: Vitesco Technologies collaborated with Groupe PSA and Hyundai. The collaboration was aimed to provide the first fully integrated, electric axle drive system for volume-production models.

Sep-2019: Robert Bosch teamed up with Contemporary Amperex Technology Co (CATL), the Chinese battery cell producer. The collaboration was focused on developing high-performance battery cells. CATL aimed to design, develop, and manufacture electric car battery cells to Bosch specifications as part of the Germany Company's development of a 48-volt hybrid powertrain system, which is used to augment a combustion engine and charge the battery during braking, cutting fuel consumption by up to 15%.

May-2019: BorgWarner established a joint venture with Romeo Power Technology, a Californian supplier of battery modules and battery packs. This joint venture complements BorgWarner's propulsion portfolio and was initiated to bridge the gap in the marketplace between battery cell manufacturers and hybrid and electric vehicle customers.

May-2019: Hitachi Automotive teamed up with Audi following which its electric vehicle (EV) inverter has been selected by Audi for its first mass-production EV, the e-tron. This inverter has been developed and designed for EVs and provides high-power density output that helps to maximize motor performance.

Feb-2019: BorgWarner collaborated with a major European commercial vehicle manufacturer. Following the collaboration, the manufacturer has chosen BorgWarner's High Voltage Hairpin (HVH) 410 electric motor for a plug-in hybrid electric truck (PHEV). Acquisition and Mergers:

May-2020: ZF acquired WABCO, a technology leader in commercial vehicle technology.



The acquisition expanded its commercial vehicle service portfolio.

Jan-2020: BorgWarner signed an agreement to acquire Delphi Technologies, a provider of vehicle propulsion technologies. The acquisition would strengthen BorgWarner's power electronics products, capabilities, and scale.

Dec-2018: Schaeffler took over Elmotec Statomat, the German motor-making machinery specialist. The acquisition enabled it to seamlessly and completely accommodate the industrialization of electric motor construction within the company. Dec-2018: Hitachi signed an agreement to acquire the power grid business of ABB Ltd. The acquisition would strengthen the electronics maker's competitiveness in the power transmission business.

Dec-2017: Schaeffler completed the acquisition of Compact Dynamics GmbH, the highend electric motor manufacturer. Through this acquisition, the former company gained expertise and expanded its portfolio offering for the high-end vehicle production market. Oct-2017: Valeo took over FTE Automotive, a leading producer of actuators. The acquisition enabled Valeo to expand its offering of active hydraulic actuators. Feb-2017: Nidec completed the acquisition of Leroy-Somer and Control Techniques, Emerson Electric's motors, drives, and generator businesses. The acquisitions broadened Nidec's motor offering and product lineup including variable speed drives. Jan-2016: Magna International acquired the GETRAG Group of Companies, one of the world's leading independent suppliers of automotive transmissions. The acquisition complemented Magna Powertrain's expertise in engineering and manufacturing and provided new opportunities for growth.

Geographical Expansions:

Apr-2020: Vitesco Technologies, the powertrain business of Continental is opening a research and development center in the Chinese port metropolis of Tianjin. The company signed a corresponding agreement with the Administration Committee of the Tianjin Economic-Technological Development Area. The new center would develop technologies for hybrid and electric powertrains.

Apr-2016: Valeo India opened a wiper motor manufacturing facility at Vallam, Chennai. The facility was aimed to manufacture rear wiper motors for OEMs and the aftermarket segment in the country.

Mar-2019: Mitsubishi Electric opened a new plant in the Czech Republic to produce motors and inverters for electric motor vehicles.

Scope of the Study

Market Segmentation:

By Electric Vehicle Type



BEV			
HEV	//PHEV		
By Component			
Batto	ery		
Tran	smission		
Con	verter		
Pow	er Electronics Controller		
On-k	ooard Charger		
Moto	or/Generator		
Othe	ers		
By Geography			
Nort	h America		
	US		
	Canada		
	Mexico		
	Rest of North America		
Europe			
	Germany		
	UK		



		France
		Russia
		Spain
		Italy
		Rest of Europe
Asia Pacific		Pacific
		China
		Japan
		India
		South Korea
		Singapore
		Malaysia
		Rest of Asia Pacific
LAMEA		
		Brazil
		Argentina
		UAE
		Saudi Arabia
		South Africa



Nigeria

Rest of LAMEA

### **Companies Profiled**

Robert Bosch GmbH

Mitsubishi Electric Corporation

Magna International, Inc.

ZF Friedrichshafen AG

Valeo SA

Nidec Corporation

Continental AG

Hitachi, Ltd.

BorgWarner, Inc.

Schaeffler AG

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