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# Global Heavy Truck Battery Replacement Solution Market Growth 2026-2032

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## Abstracts

The global Heavy Truck Battery Replacement Solution market size is predicted to grow from US$ 177 million in 2025 to US$ 564 million in 2032; it is expected to grow at a CAGR of 18.2% from 2026 to 2032.

Heavy Truck Battery Replacement Solution refers to an integrated battery swapping and energy replenishment system designed for battery-electric heavy-duty trucks. The research scope primarily covers complete swapping-station solutions consisting of automated battery handling mechanisms, battery charging and storage positions, vehicle positioning and identification systems, battery locking and electrical connection mechanisms, charging modules, power distribution equipment, safety and fire-protection systems, station controllers, energy management systems, and digital operating platforms. Main commercial architectures include overhead top-lifting battery swapping, chassis bottom battery swapping, and selected mobile or side-lifting configurations. Key specifications include battery slot capacity, rated charging power, daily service capacity, swap time, supported battery energy, automation level, and multi-brand vehicle compatibility. A typical commercial system can complete a battery exchange within several minutes, allowing high-utilization heavy trucks to reduce charging-related downtime. Heavy Truck Battery Replacement Solution occupies the energy replenishment infrastructure layer between electric heavy-duty trucks, traction batteries, and the power system, and is primarily deployed in mining, steel transportation, ports, closed-loop logistics, construction-material transportation, and increasingly regional and highway freight corridors.

## Key Findings

Global Heavy Truck Battery Replacement Solution shipments were approximately 950

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sets in 2025

Weighted manufacturer-level FOB-equivalent pricing was approximately US$190,000 per set in 2025

Overhead top-lifting systems accounted for more than 70% of 2025 solution shipments

Mining and steel transportation represented approximately 35% of global downstream demand

## Market Trends

Heavy Truck Battery Replacement Solution is transitioning from project-based infrastructure for closed industrial scenarios toward standardized, modular, networked, and increasingly interoperable energy replenishment infrastructure. Overhead top-lifting remains the dominant installed architecture, but chassis bottom swapping is expanding as vehicle platforms become more standardized and customers place greater emphasis on lower vehicle center of gravity, battery capacity flexibility, and cross-brand compatibility. CATL's QIJI architecture combines standardized battery blocks, swapping stations, and a cloud platform, while its station design targets compatibility with different brands and models through adaptive positioning. The company has also planned trunk-route networks connecting major logistics corridors, indicating that the commercial model is extending beyond isolated mines, ports, and steel plants toward networked highway freight. At the station level, modular and relocatable products are lowering deployment thresholds. SANY's 3+1 integrated charging and swapping station requires only 35.3 square meters, supports swap times of no more than 300 seconds, and can be deployed within approximately 12 hours, while Gotion has introduced a mobile modular heavy-truck swapping system capable of approximately five-minute battery replacement. The longer-term technology direction is therefore moving toward higher compatibility, faster deployment, integrated charging and swapping, intelligent scheduling, and closer coordination among vehicles, batteries, stations, and the grid.

## Market Dynamics

### Drivers

The primary market driver is the economic requirement to maximize utilization of high-value heavy-duty transport assets. Heavy trucks operating in mines, steel plants, ports, construction-material transportation, and regional logistics commonly operate for long

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hours and on relatively predictable routes, making prolonged charging time a direct operating cost. Battery swapping reduces energy replenishment to several minutes and enables fleets to separate vehicle ownership from battery assets, improve vehicle utilization, and centralize battery charging and lifecycle management. Expansion of electric heavy-duty truck fleets is also creating a larger installed base for dedicated energy infrastructure. CATL's QIJI projects have already moved from closed industrial applications into port and trunk-line scenarios, while Qiyuan Core Power initiated centralized procurement of heavy-truck swapping stations for its 2025–2026 infrastructure program, demonstrating continued large-scale station deployment demand. Regulatory standardization is another important catalyst. China's GB/T 40032.2-2025, Electric Vehicle Battery Swap Safety Requirements Part 2 Commercial Vehicles, was released in April 2025 and implemented in November 2025, strengthening the technical framework for commercial-vehicle battery swapping.

## Restraints

Heavy Truck Battery Replacement Solution requires significant upfront investment in swapping equipment, electrical infrastructure, grid connection, land, and spare battery inventory, making project economics highly dependent on station utilization. Dedicated stations serving small fleets or irregular transport volumes may struggle to generate sufficient swapping frequency to absorb fixed costs. The technology also competes directly with increasingly powerful fast-charging and megawatt-charging systems, particularly for fleets with sufficient parking or mandated rest periods. Another limitation is the coexistence of multiple battery dimensions, mounting structures, locking mechanisms, communication protocols, and vehicle platforms. Although standardized systems are improving interoperability, the industry has not yet achieved universal cross-brand interchangeability. Price competition is also intensifying as station structures become modularized. SANY's compact station has already lowered the entry investment for a complete charging-and-swapping unit to below RMB1 million, while Gotion states that its mobile system can reduce investment to a fraction of a traditional fixed station. Falling equipment ASPs are positive for adoption but create margin pressure for equipment manufacturers.

## Opportunities

The largest incremental opportunity lies in expanding from single-site fleet infrastructure to regional and trunk-route energy networks. Closed-loop mines, steel plants, ports, and construction-material fleets provide predictable demand and remain the commercial foundation of the industry, but cross-city and highway freight can significantly enlarge the addressable market if battery standards and station interoperability improve. CATL's

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420-kilometer Ningde-Xiamen heavy-truck swapping corridor demonstrates that swapping can support intercity freight rather than only fixed-route industrial operations. Additional opportunities are emerging from integrated charging-and-swapping stations, photovoltaic and storage integration, mobile swapping systems, and energy-management services. ENERAX already offers top-lifting single-lane and dual-lane stations, mobile side-lifting stations, and chassis-swapping products for different operating environments, demonstrating how a single supplier can expand through differentiated station architectures. Suppliers capable of integrating equipment, charging systems, software, battery management, maintenance, and energy services can therefore capture a larger share of the value chain than pure mechanical-equipment manufacturers.

### Challenges

Standardization, utilization, and business-model sustainability remain the major long-term challenges. A public swapping network requires vehicles from different OEMs to use compatible battery interfaces, positioning systems, mechanical locking structures, communication protocols, and safety procedures, while existing fleets still contain multiple technology generations. Higher station throughput also creates more demanding requirements for automated handling reliability, high-power electrical systems, battery thermal management, firefighting, and predictive maintenance. At the commercial level, equipment manufacturers must balance lower station prices with the need to maintain reliability and after-sales service, while operators must manage electricity tariffs, battery depreciation, peak-demand charges, land costs, and utilization uncertainty. Competition from megawatt charging is likely to intensify in long-haul applications, meaning battery swapping must demonstrate a clear total-cost-of-ownership advantage rather than relying solely on faster replenishment. International expansion introduces another challenge because heavy-truck dimensions, regulatory standards, grid conditions, fleet economics, and vehicle platforms differ significantly by market.

## Industry Chain Analysis

The upstream Heavy Truck Battery Replacement Solution industry chain includes traction battery cells and packs, battery enclosures, high-voltage connectors, locking mechanisms, charging modules, power electronics, transformers and distribution equipment, industrial robots and gantry systems, sensors, controllers, communication modules, thermal management, and fire-protection systems. Battery suppliers and vehicle manufacturers determine important interface specifications, while mechanical

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automation and electrical equipment suppliers provide the core physical infrastructure. Midstream participants integrate battery handling machinery, charging systems, vehicle identification and positioning, station control, energy management, cloud software, and construction engineering into complete swapping stations. The confirmed supplier base therefore includes battery and energy-system companies with integrated swapping solutions, professional swapping-equipment manufacturers, electrical-equipment groups, commercial-vehicle ecosystem companies, and infrastructure operators.

Downstream customers include mining and steel enterprises, ports, logistics fleets, construction-material companies, commercial-vehicle operators, energy companies, and public infrastructure operators. Value creation extends beyond the mechanical swapping device itself. Higher-value solutions integrate battery scheduling, station energy management, remote monitoring, predictive maintenance, vehicle-station-battery data interaction, and grid-side optimization. CATL's QIJI system integrates batteries, stations, and cloud software, while GCL Energy Technology combines battery development, swapping-station development, operation, intelligent maintenance, and battery management within its energy-service architecture. The industry's typical gross margin of approximately 18%–25% therefore represents a blended equipment and system-integration level, with profitability varying according to station size, software content, engineering scope, standardization, and service model.

## Segment Insights

By Battery Swap Architecture, overhead top-lifting solutions account for slightly more than 70% of current shipments and remain the dominant commercial architecture because of their mature supply chain, large installed vehicle base, and relatively standardized mechanical design. Chassis bottom swapping accounts for slightly more than one-fifth of demand and is gaining strategic importance because it can lower the vehicle center of gravity and support more standardized battery integration. Other side-lifting and mobile architectures remain below 10%. By Battery Slot Capacity, stations with five to eight battery positions represent close to 60% of demand, reflecting a balance between equipment investment and service throughput; stations with four or fewer slots are more suited to smaller fleets, while stations with nine or more slots primarily serve high-throughput industrial operations.

By Rated Charging Power, systems above 1.5 MW and up to 3 MW account for more than half of demand and constitute the mainstream commercial configuration, while lower-power stations serve smaller fleets and higher-power systems address intensive operating environments. By Application, mining and steel transportation represents

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approximately 35% of demand, followed by ports and closed-loop logistics at approximately one quarter. Construction-material and urban short-haul transportation contributes less than one-fifth, while highway and regional trunk logistics has already developed into a meaningful segment and represents one of the most important future expansion directions. These four dimensions—Battery Swap Architecture, Battery Slot Capacity, Rated Charging Power, and Application—provide the clearest statistical framework for differentiating technology, station scale, investment level, and downstream demand.

## Downstream Market Opportunities

Mining, steel, ports, sand and gravel transportation, concrete, and other high-frequency short-haul applications remain the most attractive near-term markets because fleet routes, daily mileage, and energy demand are predictable, enabling station operators to maintain high utilization. Dual-lane and high-throughput stations are particularly suitable for steel, coal, and port applications where simultaneous vehicle servicing reduces queueing losses; ENERAX explicitly positions its dual-lane commercial-vehicle stations for steel, coal, ports, and infrastructure scenarios. Regional and highway logistics represents the more strategically important incremental market. CATL has developed heavy-truck swapping corridors, while Farizon commercial vehicles already offer heavy-duty tractor configurations supporting three-to-five-minute swapping and have developed their own charging-and-swapping infrastructure. As transport distance expands, customer requirements will shift from a single station's mechanical performance toward network coverage, cross-brand compatibility, battery availability, digital scheduling, and total energy cost.

## Regional Insights

China is the dominant commercialization market for Heavy Truck Battery Replacement Solution and has developed the industry's broadest combination of swappable heavy-duty truck models, station-equipment manufacturers, battery suppliers, energy operators, and application scenarios. Commercial deployment has expanded from mines, steel plants, ports, and construction-material transportation into intercity corridors and public energy networks. CATL planned 300 QIJI stations across 13 core regions and 11 trunk corridors for 2025, while collaborations with logistics operators and energy companies are accelerating network formation. China's regulatory environment is also becoming more standardized following implementation of the national commercial-vehicle battery swapping safety requirements.

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Markets outside China remain materially earlier in commercialization but are moving beyond purely conceptual development. Germany's eHaul specializes in fully automated heavy-duty truck swapping stations with approximately five-minute swaps and dual swapping and cable-charging capability. Australia's Janus Electric has commercialized an exchangeable battery architecture for Class 8 prime movers with approximately four-minute swaps. India entered an important demonstration and early commercialization phase in 2025 when Energy In Motion launched battery-swappable heavy-duty electric tractors and a public heavy-duty commercial-vehicle battery swapping and charging station. Overseas opportunities are therefore significant but will depend on fleet concentration, vehicle standardization, grid economics, and the ability to establish sufficient network density.

## Competitive Landscape Analysis

The Heavy Truck Battery Replacement Solution market combines several types of competitors rather than a single homogeneous equipment-manufacturer group. CATL competes through standardized battery blocks, chassis swapping, cloud platforms, and network construction; Qiyuan Core Power combines battery systems, station infrastructure, network operation, and transport-energy integration; SANY leverages its heavy-equipment and commercial-vehicle ecosystem to offer compact charging-and-swapping stations with direct sale, leasing, and BOT models. Professional equipment suppliers including Shanghai Enneagon Energy, ENERAX, Bozhon Precision, SOJO Electric, XJ Electric, GreenHub Energy, Aulton New Energy, Jingzhi Machine, Sichuan Zhili, and Guohai Green Energy compete through automation, station architectures, engineering integration, and customized deployment. Gotion has entered the market with modular mobile heavy-truck swapping, while GCL Energy Technology and Farizon emphasize energy-service or vehicle-energy ecosystem integration. Enneagon's disclosed product portfolio spans mobile, parallel, gantry, mining-truck, and compact swapping stations, illustrating the diversification occurring within the equipment layer. Outside China, eHaul, Janus Electric, and Energy In Motion represent emerging localized approaches adapted to European, Australian, and Indian freight markets. Competitive advantage is increasingly determined by station reliability, compatibility, deployment cost, throughput, software capability, battery and vehicle ecosystem access, operational experience, and network scale rather than by the mechanical swapping mechanism alone.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Heavy Truck Battery

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Replacement Solution Industry Forecast" looks at past sales and reviews total world Heavy Truck Battery Replacement Solution sales in 2025, providing a comprehensive analysis by region and market sector of projected Heavy Truck Battery Replacement Solution sales for 2026 through 2032. With Heavy Truck Battery Replacement Solution sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Heavy Truck Battery Replacement Solution industry.

This Insight Report provides a comprehensive analysis of the global Heavy Truck Battery Replacement Solution landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Heavy Truck Battery Replacement Solution portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Heavy Truck Battery Replacement Solution market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Heavy Truck Battery Replacement Solution and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Heavy Truck Battery Replacement Solution.

This report presents a comprehensive overview, market shares, and growth opportunities of Heavy Truck Battery Replacement Solution market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Type:

Overhead Top-Lifting Battery Swap

Chassis Bottom Battery Swap

Others

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## Segmentation by Battery Slot Capacity:

Up to 4 Slots

5 to 8 Slots

9 Slots and Above

## Segmentation by Rated Charging Power:

Up to 1.5 MW

1.5 MW to 3 MW

Above 3 MW

## Segmentation by Application:

Mining and Steel Transportation

Ports and Closed-Loop Logistics

Construction Materials and Urban Short-Haul

Highway and Regional Trunk Logistics

## This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

eHaul

Janus Electric

Energy In Motion

Contemporary Amperex Technology Co., Limited

SANY Group Co., Ltd.

Shanghai Qiyuan Core Power Technology Co., Ltd.

Shanghai Enneagon Energy Technology Co., Ltd.

ENERAX (Suzhou) Technology Co., Ltd.

Bozhon Precision Industry Technology Co., Ltd.

XJ Electric Co., Ltd.

Beijing SOJO Electric Co., Ltd.

Shanghai GreenHub Energy Technology Co., Ltd.

Aulton New Energy Automotive Technology Co., Ltd.

Shenzhen Jingzhi Machine Co., Ltd.

Sichuan Zhili Smart Energy Technology Co., Ltd.

GCL Energy Technology Co., Ltd.

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Gotion High-Tech Co., Ltd.

Zhejiang Geely Farizon New Energy Commercial Vehicle Group Co., Ltd.

Guohai Green Energy (Shanghai) Co., Ltd.

## Key Questions Addressed in this Report

What is the 10-year outlook for the global Heavy Truck Battery Replacement Solution market?

What factors are driving Heavy Truck Battery Replacement Solution market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Heavy Truck Battery Replacement Solution market opportunities vary by end market size?

How does Heavy Truck Battery Replacement Solution break out by Type, by Application?

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