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# Global Onboard V2L/Bidirectional Charging Module Market Growth 2026-2032

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## Abstracts

The global Onboard V2L/Bidirectional Charging Module market size is predicted to grow from US$ 453 million in 2025 to US$ 641 million in 2032; it is expected to grow at a CAGR of 5.2% from 2026 to 2032.

A Vehicle AI Voice Assistant Module is an add-on device you install in a car that lets you control functions and apps using spoken commands powered by artificial intelligence. Instead of being built into the car from the factory, it's usually an aftermarket box, dongle, head unit, or small device that connects to the car's infotainment system, smartphone, or OBD port. In 2024, global Onboard V2L/Bidirectional Charging Module production reached approximately 1152 K unit, with an average global market price of around US$ 392 per unit.

Onboard V2L (vehicle-to-load) and broader bidirectional charging modules are power-electronics units integrated into electric vehicles that allow energy to flow both into the battery (during normal charging) and back out again to external loads, homes, or the grid. They combine the functions of an onboard charger with DC–AC/DC–DC conversion, protection, and communication interfaces, so that the vehicle can act as a mobile power source or distributed energy asset. This market sits at the convergence of the EV, power-electronics, and smart-grid sectors, and is being pulled forward as automakers look for features that differentiate their EVs beyond simple range and charging speed.

Key demand drivers include the rapid growth of EV adoption, the need for grid flexibility as renewable penetration increases, and the appeal of backup and mobile power to consumers. V2L is easy to understand and market: drivers can power camping equipment, tools at a worksite, or household appliances during outages by plugging into

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the car. At the same time, V2H (vehicle-to-home) and V2G (vehicle-to-grid) applications allow owners to time-shift energy, support peak shaving, or participate in demand-response programs, making the EV effectively a rolling home-battery system. Regulatory encouragement for smart charging, the emergence of bidirectional standards (e.g., updates around CCS, ISO 15118-20, and CHAdeMO heritage), and automakers' desire to monetize software and energy services all reinforce the adoption of onboard bidirectional capability.

Upstream, the value chain is anchored by suppliers of advanced power semiconductors (particularly SiC MOSFETs and high-voltage silicon devices), magnetics, high-reliability capacitors, microcontrollers, communication chipsets, and safety drivers. Semiconductor and component manufacturers provide reference designs and control IP, which Tier-2 and Tier-1 suppliers integrate into complete onboard charger/DC-DC assemblies. These assemblies incorporate thermal management, isolation, EMI filtering, functional safety (ISO 26262), and compliance with grid interconnection and electrical safety standards. Manufacturing is capital-intensive and technically demanding, but benefits from economies of scale as the same module platforms can often be reused across multiple EV models and brands.

Downstream, the immediate customers are automakers and platform integrators that embed these modules into passenger cars, light commercial vehicles, and in some cases buses or trucks. Beyond the vehicle, energy-service companies, home energy management system providers, aggregators, and utilities build software platforms, tariffs, and services that depend on bidirectional-capable vehicles—coordinating when and how energy flows between EVs, homes, and the grid. Installers and charge-point operators also play a role, especially where specific home or workplace hardware is needed to unlock V2H/V2G functionality. As this ecosystem matures, value increasingly shifts from pure hardware to bundled offerings that combine the onboard module with software, data, and recurring service revenue.

Overall, gross margins for onboard V2L/bidirectional charging modules are generally in the mid-teens to low-30% range, similar to other specialized automotive power-electronics systems.

## Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Onboard V2L/Bidirectional Charging Module Industry Forecast" looks at past sales and reviews total world Onboard V2L/Bidirectional Charging Module sales in 2025, providing a comprehensive

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analysis by region and market sector of projected Onboard V2L/Bidirectional Charging Module sales for 2026 through 2032. With Onboard V2L/Bidirectional Charging Module sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Onboard V2L/Bidirectional Charging Module industry.

This Insight Report provides a comprehensive analysis of the global Onboard V2L/Bidirectional Charging Module 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 Onboard V2L/Bidirectional Charging Module portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Onboard V2L/Bidirectional Charging Module market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Onboard V2L/Bidirectional Charging Module 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 Onboard V2L/Bidirectional Charging Module.

This report presents a comprehensive overview, market shares, and growth opportunities of Onboard V2L/Bidirectional Charging Module market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Type:

V2H (Vehicle-to-Home)

V2V (Vehicle-to-Vehicle)

V2G (Vehicle-to-Grid)

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## Segmentation by Feature:

AC Interface

DC Interface

## Segmentation by Channel:

Online Sales

Offline Sales

## Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- 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.

- BorgWarner

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Delta Electronics

Preh (Joyson Group)

Hyundai Mobis

BYD Company

Toyota Industries Corporation

LG Magna e-Powertrain

Yazaki Corporation

DENSO Corporation

Robert Bosch GmbH

Hitachi Astemo

Brusa Elektronik / BRUSA HyPower

Danfoss Power Solutions (Editron)

Dilong New Energy (PowerDilong)

KOSTAL Automotive

## Key Questions Addressed in this Report

What is the 10-year outlook for the global Onboard V2L/Bidirectional Charging Module market?

What factors are driving Onboard V2L/Bidirectional Charging Module market growth, globally and by region?

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

How do Onboard V2L/Bidirectional Charging Module market opportunities vary by end market size?

How does Onboard V2L/Bidirectional Charging Module break out by Type, by Application?

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