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Automotive DC-DC Converters Market by Vehicle Type (Commercial, Passenger), Propulsion Type (BEV, FCEV, PHEV), Product Type (Isolated, Non-Isolated), Input Voltage, Output Voltage, Output Power, Region - Global Forecast to 2025

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Abstracts

The automotive DC-DC converters market is projected to grow from estimated USD 339 million in 2020 to USD 1,432 million by 2025, at a CAGR of 33.4% during the forecast period. The growing adoption of energy-efficient electric vehicles such as battery electric vehicles, plug-in hybrid vehicles, and fuel cell vehicles to curb GHG emissions from the automotive industry; requirement of improved safety, fuel efficiency, and advanced driver assistance systems; and the growing demand for safety and connectivity features in passenger vehicles are driving the demand for DC-DC converters across the automotive industry.

The COVID-19 pandemic has had a severe impact on the globally integrated automotive industry. The pandemic has caused a disruption in the exports of Chinese parts, which quickly pivoted to large- scale manufacturing interruptions across Europe. In the US, closures of assembly plants are adding to the intense pressure on an increasing distressed global supply base where companies are at high risk of defaulting on covenants, potentially requiring banks to provide loans. This is placing intense pressure on an industry already coping with a downshift in global demand and likely leading to increased merger & acquisition activity. A prolonged decline in consumer demand as countries work through various lockdown scenarios may spark a global recession, leading to widespread loss of consumer confidence, significantly impacting automaker revenues and profitability. This will, in turn, negatively impact component manufacturers. According to industry experts, automotive sales are most likely to decrease 14-22% among the Chinese, US, and European markets in 2020.

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“Based on vehicle type, the passenger vehicle segment is estimated to lead the automotive DC-DC converters market during the forecast period”

Based on vehicle type, the passenger vehicle segment of the automotive DC-DC converters market is accounted for the largest share during the forecast period. The increasing demand for zero-emission vehicles is expected to provide growth opportunities for electrification in passenger vehicles and, in turn, drive the demand for DC-DC converters. Emerging markets, such as India and China, are expected to drive this growth. Automakers such as Tesla have set up local production facilities to gain cost benefits and increase sales and profitability in these areas. Also, government initiatives in the form of tax exemptions on using electric vehicles are increasing the demand from consumers to opt for environment-friendly vehicles for private and shared mobility purposes, in turn, driving the demand for passenger vehicles.

“Based on propulsion type, the battery electric vehicle segment is estimated to lead the automotive DC-DC converters market in 2020”

Based on propulsion type, the battery electric vehicle segment of the automotive DC-DC converters market is expected to grow at the highest CAGR during the forecast period. The growth of this segment can be attributed to initiatives from several manufacturers to engage in innovation to achieve greener transportation using renewable sources. The adoption of electric vehicles and vehicles with low emission by public authorities, non-profit organizations, and private companies has been increasing. To meet the surging demand for BEVs, various players are developing advanced, compact DC-DC converters. For instance, TDK-Lambda Corporation has developed the world’s smallest point of load (PoL) DC-DC converter for network storage, servers, and telecommunications. This technology can be used to meet future automotive demand.

“Based on input voltage type, the >70V segment is expected to grow at the highest CAGR during the forecast period”

Based on input voltage, the >70V segment of the automotive DC-DC converters market is expected to grow at the highest CAGR during the forecast period. These DC-DC converters are designed for rugged automotive applications that require high input voltages and wide DC-input ranges. For instance, Analog Devices, Inc.’s high input voltage buck converter family is more specialized for higher input voltage applications that range from 30V to 100V. This range simplifies design requirements in demanding automotive and industrial applications where large voltage transients can occur. With

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the increase in the adoption of electrification in heavy duty commercial vehicles, the demand for high input voltage is expected to increase significantly.

"Based on output power, the 10-20kW segment is estimated to lead the automotive DC-DC converters market during the forecast period"

Based on output power, the 10-20kW segment of the automotive DC-DC converters market is accounted for the largest share and also expected to grow at the highest CAGR during the forecast period. The power output requirements of electric vehicles are expected to increase as more electrical systems are integrated into vehicles. Also, with the increase in commercial electric vehicles, the increase in high power output requirements is expected to fuel the >20kW segment.

"Based on product type, the isolated segment is expected to grow at the highest CAGR during the forecast period"

Based on product type, the isolated segment of the automotive DC-DC converters market is accounted for the largest share and also expected to grow at the highest CAGR during the forecast period. Due to the increasing demand for safe and efficient renewable energy systems, isolated DC-DC converters are widely used in this field as essential power conversion blocks. The isolated DC-DC converters market is majorly driven by key propulsion systems of electric and hybrid vehicles, as these require high-frequency transformers that provide a barrier to high-frequency voltage.

"Asia Pacific is estimated to lead the automotive DC-DC converters market in 2020, and Europe is projected to grow at the highest CAGR during the forecast period"

The Asia Pacific region is projected to lead the market during the forecast period. Rapid growth in the automotive industry and communications systems and the subsequent rise in demand for communication devices and automotive parts & equipment are driving the market for automotive DC-DC converters within the region. The region is home to some of the fastest-developing economies of the world, such as China and India. The governments of these developing economies have recognized the growth potential of the electric vehicle market and, hence, have taken different initiatives to attract major OEMs to manufacture electric vehicles in their domestic markets. Technologically advanced countries such as Japan are home to major DC-DC manufacturers, such as TDK-Lambda Corporation (Japan), Denso Corporation (Japan), and Toshiba Corporation (Japan), among others.

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The European region is projected to grow at the highest CAGR during the forecast period. The region is estimated to exhibit growth in the coming years, resulting from an increase in demand for electric vehicles. It is home to major automobile manufacturers such as Volkswagen AG, BMW AG, and Daimler AG. To promote electric vehicles in this region, many strategies such as tax exemption and special discounts are being implemented by local governments. The rise in electrification of automotive vehicles contributes to significant demand for electrical and electronics components, including DC-DC converters.

Break-up of profile of primary participants in the automotive DC-DC converters market:

By Company Type: Tier 1 – 20%, Tier 2 – 35%, and Tier 3 – 45%

By Designation: C Level – 32%, Director Level – 27%, and Others – 41%

By Region: North America – 30%, Europe – 20%, Asia Pacific – 35%, and RoW – 15%

Major players operating in the automotive DC-DC converters market include BorgWarner Inc. (US), Denso Corporation (Japan), Valeo (France), Vicor Corporation (US), TDK-Lambda Corporation (Japan), Delta Electronics (Taiwan), Continental AG (Germany), Toyota Industries Corporation (Japan), Hyundai Mobis (South Korea), Robert Bosch GmbH (Germany), Infineon Technologies AG (Germany), Hella GmbH & Co. KGaA (Germany), and Mornsun (China), among others.

Research Coverage:

This research report categorizes the automotive DC-DC converters market on the basis of vehicle type (commercial vehicle and passenger vehicle), propulsion type (battery electric vehicles (BEV), fuel cell electric vehicles (FCEV), and plug-in hybrid electric vehicles (PHEV)), input voltage (70V), output voltage (3.3V, 5V, 12V, 15V, and 24V and above), output power (20kW), product type (isolated and non-isolated). These segments have been mapped across major regions, namely, North America, Europe, and Asia Pacific. The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the automotive DC-DC converters market. A detailed analysis of the key industry players has been done to provide insights into their business overviews; solutions and services; key strategies; mergers & acquisitions, new product launches & certifications, contracts,

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partnerships & agreements, expansions, collaborations, and joint ventures associated with the automotive DC-DC converters market.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall automotive DC-DC converters market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Market Penetration: Comprehensive information on automotive DC-DC converters offered by the top players in the market

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and mergers & acquisitions, new product launches & certifications, contracts, partnerships & agreements, expansions, collaborations, and joint ventures plans in the automotive DC-DC converters market

Market Development: Comprehensive information about lucrative markets – the report analyzes the automotive DC-DC converters market across varied regions

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the automotive DC-DC converters market

Competitive Assessment: In-depth assessment of market shares, growth strategies, products, and manufacturing capabilities of leading players in the automotive DC-DC converters market

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