

Automotive E-Compressor Market by Compressor Type (Scroll, Rotary Screw, Centrifugal, Reciprocating, Axial), Technology (VFD, Fixed Speed), Capacity (Small, Medium, Large), Vehicle Type, Propulsion (BEV, PHEV, HEV & FCEV) - Global Forecast to 2033

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Abstracts

The automotive e-compressor market is projected to reach USD 18.9 billion by 2033, from an estimated USD 6.6 billion in 2024, at a CAGR of 12.5% during the forecast period.

Stringent emission regulation and rapid infrastructure development is poised to significantly boost the sales of electric compressors during the forecast period. Regulatory agencies around the world are imposing increasingly stringent standards on vehicle emissions and fuel efficiency to address environmental concerns and combat climate change. These regulations compel automakers to explore innovative solutions to reduce greenhouse gas emissions and improve the overall efficiency of their vehicles. Electric compressors offer a compelling solution to meet these regulatory requirements by eliminating the requirement for engine-driven compressors, which can contribute to emissions and reduce fuel efficiency.

“The Large Capacity segment is the fastest-growing segment in the e-compressor market.”

Vehicles such as trucks, buses, and commercial vans are increasingly being electrified to reduce emissions and operating costs while meeting stringent regulatory requirements. Large e-compressors, with power outputs above 15 kW, play a pivotal

role in these electrified vehicles, particularly in ensuring robust climate control systems that cater to the needs of passengers and cargo.

Commercial vehicles operate in diverse environments and face unique challenges, making reliable climate control systems crucial. Large e-compressors are engineered to deliver high cooling capacity, which is essential for maintaining comfortable temperatures within the expansive cabins of buses, trucks, and vans.

The demand for large e-compressors is fueled by the need to enhance energy efficiency and reduce environmental impact in commercial operations. By electrifying HVAC systems in commercial vehicles, fleet operators can minimize reliance on fossil fuels, lower operating costs, and comply with stringent emissions regulations.

“Scroll Compressor is dominating the market by technology type.”

Scroll compressors are primarily known for their compact size, quiet operation, and high efficiency. SANDEN CORPORATION, MAHALE GmbH among other companies are offering scroll compressors. These compressors are used in both electric and hybrid vehicles, providing reliable air conditioning and climate control systems while maximizing interior space and passenger comfort. They operate with minimal energy loss due to their continuous compression process and reduced internal leakage, resulting in higher performance and lower power consumption than traditional compressor designs.

The quiet and vibration-free operation of scroll compressors enhances the driving experience in electric vehicles, contributing to a more comfortable and improved cabin environment. The absence of noise and vibration associated with traditional compressor types reduces driver fatigue, aligning with the premium expectations of modern consumers. As automakers strive to differentiate their electric vehicle offerings in the competitive market, these factors will drive the scroll compressors in the forecast period.

“China is the largest for Asia Pacific e-compressor market.”

Affordability, government support, rapid growth in charging infra and huge domestic sector for EVs have led to a surge in demand for automobiles, particularly electric vehicles (EVs). As the world's largest automotive market, China boasts a vast consumer base and a thriving automotive manufacturing sector, driving substantial demand for electric compressors to meet the needs of both domestic and international automakers operating in the country.

Government policies and incentives aimed at promoting electric vehicle adoption have played a crucial role in fueling the demand for electric compressors in China. The China government has implemented a various measures to support the growth of the electric vehicle industry, including tax incentives, subsidies, and regulatory mandates for automakers to manufacture and sell of electric vehicles. These policies will have created a favorable environment for e-compressor manufacturers and encourage investment in the development of electric vehicle components. Furthermore, China's position as a global manufacturing hub for automotive components further strengthens its status as the largest market for electric compressors in the Asia-Pacific region.

The break-up of the profile of primary participants in the automotive e-compressor market:

By Companies: OEMs - 57% Tier 1 - 29%, Tier 2 - 14%,

By Designation: Directors- 24%, CXOs - 12%, Manager level - 64%

By Region: North America - 10%, Europe -10%, APAC - 68%, and MEA - 12%

Global players dominate the automotive e-compressor market and comprise several regional players. The key players in the automotive e-compressor market are DENSO CORPORATION (Japan), Hanon Systems (South Korea), MAHLE GmbH (Germany), VALEO (France), and Sanden Corporation (Japan).

Research Coverage:

This Research Report Categorizes e-compressor by compressor type (Scroll Compressors, Rotary Screw Compressors, Centrifugal Compressors, Reciprocating Compressors, And Axial Compressors), by Capacity (Small, Medium and Large), by vehicle type (Passenger Cars, Light Commercial Vehicle and Heavy Commercial Vehicle), by technology (VFD, Fixed Speed), by vehicle type (BEV, HEV, PHEV, and FCEV), and by Region (Asia Pacific, Europe, North America, and Rest of the World).

The report's scope covers detailed information regarding the major factors, such as influencing factors for the growth of the automotive e-compressor market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products, key strategies; contracts, agreements, new product launches, and recent developments associated with the market.

Key Benefits of Buying the Report:

The report will help the market leaders/new entrants in this market with the information on the closest approximations of the revenue numbers for the overall automotive e-compressor market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain insights to better position their businesses and 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:

Analysis of key drivers (Rising global demand for electric vehicle, Stringent emission regulations and heightened environmental concerns, Increased awareness about the climate control & comfort features in vehicle), restraints (Lack of sufficient EV charging infrastructure in developing economies), opportunities (Advancement in e-compressor technology), and challenges (High initial cost of e-compressor compared to conventional belt compressors and Technological complexities & integration challenges) influencing the growth of the automotive e-compressor market.

Product Development/Innovation: Detailed insights on technologies, and new product launches in the automotive e-compressor market.

Market Development: Comprehensive information about the markets – the report analyses the authentication and brand protection market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, and recent developments in automotive e-compressor market.

Competitive Assessment: In-depth assessment of market shares, growth strategies offerings of leading players like DENSO CORPORATION (Japan), Hanon Systems (South Korea), MAHLE GmbH (Germany), VALEO (France), and Sanden Corporation (Japan) among others in automotive e-compressor market.

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