

Automotive Power Electronics Market by Device Type (Power IC, Module & Discrete), Application, Component (Sensor & Microcontroller), Material, Vehicle Type (Passenger Vehicle, LCV & HCV), Electric Vehicle Type, and Region - Global Forecast to 2025

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Abstracts

“Use of mechatronics systems and race towards making vehicle safer and fuel efficient are driving the growth of the automotive power electronics market.”

The global automotive power electronics market size is projected to grow from USD 3.8 billion in 2020 to USD 4.7 billion by 2025, at a CAGR of 4.7%. Increasing electronic content per vehicle, adoption of new safety features, development in vehicle powertrain and increasing vehicle management & connectivity features are fuelling factors for the growth of automotive power electronics market.

“Growing demand for safety and connectivity features inside the passenger vehicle likely to drive the growth of the automotive power electronics market during the forecast period”

The automotive industry is witnessing a rapid evolution of safety features, which is expected to increase exponentially in the coming years to provide a safer and more convenient driving experience. Major OEMs are launching more passenger vehicles with ADAS & safety, infotainment and telematics features. Economy and mid-size class of passenger vehicles are getting inspired by safety and connectivity features from luxury vehicles. They are getting installed with seat control, lighting, infotainment features at an affordable prices. Tier I and Tier II companies also try and develop new

features in passenger vehicles only. Such features at the initial stage are offered in luxury vehicles. As the economies of scale reaches, such features are offered in mid-size and economy vehicles. Government mandates related to vehicle safety and emission also force people to buy new vehicles. This has helped passenger vehicle to show the fastest growth among vehicle type segment for the automotive power electronics market.

“Innovations in the field vehicle power converters for electric vehicle is helping AC-DC, DC-AC & DC-DC converter segment to dominate the automotive power electronics market”

In the context of electric vehicle power electronics, power converters is one area where innovation and development is going on. Power converters includes AC-DC converter known as rectifier, Dc-AC converter known as inverter and DC-DC converter. These power converters are required in every kind of electric vehicles. Continuous innovation leads to the fluctuation of prices associated with the components of power converters. This translates into the bigger market for AC-DC, DC-AC & DC-DC converter. In May 2019, Infineon Technologies launched power modules for xEV inverters. At the PCIM trade fair 2019, Infineon presented four new HybridPACK™ Drive modules optimized for different inverter performance levels between 100 kW and 200 kW. Such innovations in power converters leads to dominance of AC-DC, DC-AC & DC-DC converter segment.

“Flourishing automotive market in developing countries is driving the regional automotive power electronics market.”

Asia Pacific is holding the largest share in the automotive power electronics market. Whereas, South America is showing the highest growth rate among other regions. Both these regions comprise of some of the fastest growing economies in the World. India, China, Brazil are considered as developing economies. These countries are large in terms of populations hence are the potential market for automotive industry. Asia Pacific has Japan and South Korea which are among the most developed countries in the context of technology innovation and adoption for automotive. Government mandates related to vehicle safety, emissions, connectivity in these countries are applicable for mass produced vehicles. Future vehicles in this region need to be fitted with advanced features. This helped Asia Pacific to dominate the market for automotive power electronics. South America region is showing the highest growth rate in automotive power electronics market during forecast period. Brazil and Argentina are among the countries that has shown good growth in automotive sector in past few years. Automotive sector contributes heavily in the GDP of these countries. Government of

these countries are also focusing on increasing share of automotive sector in the national GDP.

The COVID-19 crisis has resulted in manufacturing and supply disruptions across the globe, due to which, the automobile industry in the every region has experienced a decline in demand with an uncertain recovery timeline. Additionally, OEMs have stopped production across their manufacturing facilities in different regions, which has resulted in a decline in production as well as sales. Automotive-related high-tech tests that companies were carrying out in the different region have also been suspended.

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Company Type: OEMs - 47%, Tier 1 – 33%, and Tier 2 – 22%,

By Designation: C-Level - 40%, Manager & Other Level - 30%, and Technical person - 30%

By Region: Asia Pacific - 40%, Europe - 30%, North America - 20%, and South America and RoW- 10%

The automotive power electronics market comprises major manufacturers such as Robert Bosch (Germany), Continental AG (Germany), Infineon (Germany), STMicroelectronics (Switzerland), and ON Semiconductor (US).

Research Coverage:

The study covers the automotive power electronics market across various segments. It aims at estimating the market size and future growth potential of this market across different segments such as device type, application, component, material type, vehicle type, electric vehicle type, and region. The study also includes an in-depth competitive analysis of key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and acquisitions.

Key Benefits of Buying the Report:

The report will help leaders/new entrants in this market with information on the closest

approximations of the revenue numbers for the overall automotive power electronics market. This report will help stakeholders understand the competitive landscape and gain more 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

Contents

1 INTRODUCTION

1.1 OBJECTIVES OF THE STUDY

1.2 PRODUCT DEFINITION

1.2.1 INCLUSIONS & EXCLUSIONS

TABLE 1 INCLUSIONS & EXCLUSIONS FOR THE AUTOMOTIVE POWER ELECTRONICS MARKET

1.3 MARKET SCOPE

FIGURE 1 AUTOMOTIVE POWER ELECTRONICS MARKET SEGMENTATION

1.3.1 YEARS CONSIDERED FOR THE STUDY

1.4 PACKAGE SIZE

1.5 LIMITATIONS

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

FIGURE 2 MARKETSANDMARKETS DOWNGRADES ITS FORECAST OF THE AUTOMOTIVE POWER ELECTRONICS MARKET

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 3 AUTOMOTIVE POWER ELECTRONICS MARKET: RESEARCH DESIGN

FIGURE 4 RESEARCH DESIGN MODEL

2.2 SECONDARY DATA

2.2.1 KEY SECONDARY SOURCES

2.2.2 KEY DATA FROM SECONDARY SOURCES

2.3 PRIMARY DATA

FIGURE 5 BREAKDOWN OF PRIMARY INTERVIEWS

2.3.1 SAMPLING TECHNIQUES & DATA COLLECTION METHODS

2.3.2 PRIMARY PARTICIPANTS

2.4 FACTOR ANALYSIS

2.4.1 DEMAND-SIDE ANALYSIS

2.4.1.1 System topology dictates the size and functional requirements of the power electronics components

TABLE 2 REQUIRED FEATURES OF AN AUTOMOTIVE POWER ELECTRONICS COMPONENT

2.4.1.2 Emergence of new concepts of autonomous and connected cars

2.4.2 SUPPLY-SIDE ANALYSIS

2.4.2.1 Stringent safety regulations and demand for comfort & luxury influencing the automotive power electronics market

2.5 MARKET SIZE ESTIMATION

2.5.1 DEMAND-SIDE APPROACH

FIGURE 6 DEMAND-SIDE APPROACH: AUTOMOTIVE POWER ELECTRONICS MARKET

2.5.2 PARENT MARKET TEAR DOWN APPROACH

FIGURE 7 PARENT MARKET TEAR DOWN APPROACH: AUTOMOTIVE POWER ELECTRONICS MARKET

2.5.3 BOTTOM-UP APPROACH

FIGURE 8 BOTTOM-UP APPROACH: AUTOMOTIVE POWER ELECTRONICS MARKET

2.6 MARKET BREAKDOWN

FIGURE 9 DATA TRIANGULATION

2.7 ASSUMPTIONS/CONSIDERATIONS

2.8 LIMITATIONS

2.9 RISK ASSESSMENT & RANGES

TABLE 3 RISK ASSESSMENT & RANGES

3 EXECUTIVE SUMMARY

FIGURE 10 MARKET OUTLOOK: AUTOMOTIVE POWER ELECTRONICS

TABLE 4 FOCUS OF AUTOMOTIVE POWER ELECTRONICS COMPANIES IN CONTEXT OF NEW PRODUCT DEVELOPMENTS

FIGURE 11 AUTOMOTIVE POWER ELECTRONICS MARKET: MARKET DYNAMICS

FIGURE 12 AUTOMOTIVE POWER ELECTRONICS MARKET: REGIONAL OVERVIEW

FIGURE 13 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020 VS. 2025

FIGURE 14 AUTOMOTIVE POWER ELECTRONICS MARKET FOR ELECTRIC VEHICLE, BY DEVICE TYPE, 2020 VS. 2025

FIGURE 15 COVID-19 IMPACT ON THE AUTOMOTIVE POWER ELECTRONICS MARKET

4 PREMIUM INSIGHTS

4.1 BRIEF OVERVIEW OF THE AUTOMOTIVE POWER ELECTRONICS MARKET

FIGURE 16 INCREASING ELECTRONICS CONTENT PER VEHICLE IS EXPECTED TO DRIVE THE AUTOMOTIVE POWER ELECTRONICS MARKET

4.2 ASIA PACIFIC AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE AND COUNTRY

FIGURE 17 PASSENGER VEHICLE SEGMENT AND CHINA PROJECTED TO BE THE LARGEST IN THE AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE AND COUNTRY, IN TERMS OF VALUE

4.3 AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY

FIGURE 18 MEXICO AND BRAZIL EXPECTED TO WITNESS FAST GROWTH DURING

2020-2025 (VALUE)

4.4 AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION TYPE

FIGURE 19 BODY CONTROL & COMFORT SEGMENT IS PROJECTED TO HAVE THE LARGEST MARKET SHARE BY 2025, IN TERMS OF VALUE

4.5 AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE

FIGURE 20 PASSENGER VEHICLE SEGMENT IS ESTIMATED TO DOMINATE THE MARKET, IN TERMS OF VALUE

4.6 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE

FIGURE 21 POWER MODULE/DISCRETE SEGMENT IS ESTIMATED TO DOMINATE THE MARKET

4.7 AUTOMOTIVE POWER ELECTRONICS MARKET FOR ELECTRIC VEHICLE, BY DEVICE TYPE

FIGURE 22 AC-DC, DC-AC & DC-DC CONVERTER SEGMENT IS ESTIMATED TO DOMINATE THE MARKET

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 23 AUTOMOTIVE POWER ELECTRONICS MARKET DYNAMICS

5.2.1 DRIVERS

- 5.2.1.1 Increasing modernization of vehicles to impact the power electronics market
- 5.2.1.2 Increasing demand for energy-efficient, battery-powered devices
- 5.2.1.3 Rising trend of vehicle electrification

5.2.2 RESTRAINTS

- 5.2.2.1 Increase in the overall cost of the vehicle
- 5.2.2.2 Complex design and integration process for advanced applications

5.2.3 OPPORTUNITIES

- 5.2.3.1 Growing demand for advanced safety, convenience, and comfort systems

5.2.3.2 Increasing use of SiC and GaN products in vehicle applications

5.2.4 CHALLENGES

5.2.4.1 Managing cost and quality of power electronic components

5.2.4.2 Demand for compact devices with high efficiency

5.2.5 IMPACT OF MARKET DYNAMICS

TABLE 5 AUTOMOTIVE POWER ELECTRONICS MARKET: IMPACT OF MARKET DYNAMICS

5.3 REVENUE SHIFT DRIVING MARKET GROWTH

FIGURE 24 REVENUE SHIFT DRIVING THE AUTOMOTIVE POWER ELECTRONICS MARKET GROWTH

5.4 VALUE CHAIN ANALYSIS

FIGURE 25 VALUE CHAIN ANALYSIS: AUTOMOTIVE POWER ELECTRONICS MARKET

5.5 AVERAGE SELLING PRICE TREND

FIGURE 26 AVERAGE SELLING PRICE TREND: AUTOMOTIVE POWER ELECTRONICS MARKET

6 INDUSTRY TREND

6.1 AUTOMOTIVE POWER ELECTRONICS LIFE CYCLE

FIGURE 27 AUTOMOTIVE POWER ELECTRONICS LIFECYCLE

6.2 TECHNOLOGY ANALYSIS

6.2.1 DOUBLE-SIDE COOLING OF POWER MODULE

FIGURE 28 CUSTOM POWER MODULE OF TOYOTA LS600

6.3 AUTOMOTIVE POWER ELECTRONICS MARKET TRENDS

6.3.1 USE OF GALLIUM NITRIDE TECHNOLOGY

6.3.2 USE OF MODERN INVERTERS FOR ELECTRIC VEHICLES

6.3.3 PACKAGING TREND OF POWER MODULES FOR ELECTRIC VEHICLES

6.4 PORTER'S FIVE FORCES

FIGURE 29 PORTER'S FIVE FORCES: AUTOMOTIVE POWER ELECTRONICS MARKET

7 IMPACT ANALYSIS: COVID-19

7.1 INTRODUCTION TO COVID-19

7.2 COVID-19 HEALTH ASSESSMENT

FIGURE 30 COVID-19: THE GLOBAL PROPAGATION

FIGURE 31 COVID-19 PROPAGATION: SELECT COUNTRIES

7.3 COVID-19 ECONOMIC ASSESSMENT

FIGURE 32 REVISED GDP FORECASTS FOR SELECT G20 COUNTRIES IN 2020

7.3.1 SCENARIOS IN TERMS OF RECOVERY OF THE GLOBAL ECONOMY

FIGURE 33 CRITERIA IMPACTING THE GLOBAL ECONOMY

FIGURE 34 SCENARIOS IN TERMS OF RECOVERY OF THE GLOBAL ECONOMY

7.4 COVID-19 AND THE AUTOMOTIVE INDUSTRY

TABLE 6 IMPACT OF COVID-19 ON LARGE AUTOMOTIVE MARKETS

7.5 OEM ANNOUNCEMENTS

TABLE 7 OEM ANNOUNCEMENTS

7.6 IMPACT ON THE GLOBAL AUTOMOTIVE INDUSTRY AND VEHICLE PRODUCTION

7.7 IMPACT OF COVID-19 ON THE AUTOMOTIVE POWER ELECTRONICS MARKET

7.8 AUTOMOTIVE POWER ELECTRONICS MARKET, SCENARIOS (2020–2025)

FIGURE 35 AUTOMOTIVE POWER ELECTRONICS MARKET– FUTURE TRENDS & SCENARIO, 2020–2025 (USD MILLION)

7.8.1 MOST LIKELY SCENARIO

TABLE 8 AUTOMOTIVE POWER ELECTRONICS MARKET (MOST LIKELY), BY REGION, 2017–2025 (USD MILLION)

7.8.2 OPTIMISTIC SCENARIO

TABLE 9 AUTOMOTIVE POWER ELECTRONICS MARKET (OPTIMISTIC), BY REGION, 2017–2025 (USD MILLION)

7.8.3 PESSIMISTIC SCENARIO

TABLE 10 AUTOMOTIVE POWER ELECTRONICS MARKET (PESSIMISTIC), BY REGION, 2017–2025 (USD MILLION)

8 AUTOMOTIVE POWER ELECTRONICS MARKET, BY MATERIAL TYPE

8.1 INTRODUCTION

TABLE 11 SEMICONDUCTOR BANDWIDTH COMPARISON OF VARIOUS MATERIALS

8.2 SILICON (SI)

8.3 SILICON CARBIDE (SIC)

8.4 GALLIUM NITRIDE (GAN)

8.5 OTHERS

8.5.1 GALLIUM OXIDE (GA2O3)

8.5.2 DIAMOND (C)

9 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE

9.1 INTRODUCTION

FIGURE 36 POWER MODULE/DISCRETE DEVICE TYPE TO DOMINATE THE AUTOMOTIVE POWER ELECTRONICS MARKET BY 2025 (USD MILLION)

TABLE 12 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 13 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 14 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 15 AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

9.1.1 ASSUMPTIONS

9.1.2 RESEARCH METHODOLOGY FOR DEVICE TYPE

9.2 DEVICE TYPE

9.2.1 POWER IC

TABLE 16 POWER IC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 17 POWER IC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 18 POWER IC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 19 POWER IC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

9.2.2 POWER MODULE

9.2.2.1 Intelligent Power Module (IPM)

9.2.2.2 Power Integrated Module (PIM)

9.2.3 POWER DISCRETE

9.2.3.1 Diode

9.2.3.2 Transistor

9.2.3.3 Thyristor

TABLE 20 POWER MODULE/DISCRETE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 21 POWER MODULE/DISCRETE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 22 POWER MODULE/DISCRETE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 23 POWER MODULE/DISCRETE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

9.3 KEY INDUSTRY INSIGHTS

10 AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION TYPE

10.1 INTRODUCTION

FIGURE 37 BODY CONTROL & COMFORT SEGMENT TO DOMINATE THE AUTOMOTIVE POWER ELECTRONICS MARKET BY 2025 (USD MILLION)

TABLE 24 AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION TYPE, 2017–2019 (MILLION UNITS)

TABLE 25 AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION TYPE, 2020–2025 (MILLION UNITS)

TABLE 26 AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION TYPE, 2017–2019 (USD MILLION)

TABLE 27 AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION TYPE, 2020–2025 (USD MILLION)

10.1.1 ASSUMPTIONS

10.1.2 RESEARCH METHODOLOGY FOR APPLICATION TYPE

10.2 APPLICATION TYPE

10.2.1 ADAS & SAFETY

TABLE 28 ADAS & SAFETY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (MILLION UNITS)

TABLE 29 ADAS & SAFETY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (MILLION UNITS)

TABLE 30 ADAS & SAFETY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (USD MILLION)

TABLE 31 ADAS & SAFETY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (USD MILLION)

10.2.1.1 ADAS

TABLE 32 ADAS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 33 ADAS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 34 ADAS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 35 ADAS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.1.2 Electric power steering (EPS)

TABLE 36 ELECTRIC POWER STEERING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 37 ELECTRIC POWER STEERING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 38 ELECTRIC POWER STEERING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 39 ELECTRIC POWER STEERING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.1.3 Anti-lock braking system (ABS)

TABLE 40 ANTI-LOCK BRAKING SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 41 ANTI-LOCK BRAKING SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 42 ANTI-LOCK BRAKING SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 43 ANTI-LOCK BRAKING SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.2 BODY CONTROL & COMFORT

TABLE 44 BODY CONTROL & COMFORT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (MILLION UNITS)

TABLE 45 BODY CONTROL & COMFORT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (MILLION UNITS)

TABLE 46 BODY CONTROL & COMFORT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (USD MILLION)

TABLE 47 BODY CONTROL & COMFORT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (USD MILLION)

10.2.2.1 TPMS

TABLE 48 TPMS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 49 TPMS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 50 TPMS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 51 TPMS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.2.2 Lighting

10.2.2.2.1 Exterior Lighting

10.2.2.2.2 Interior Lighting

TABLE 52 LIGHTING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 53 LIGHTING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 54 LIGHTING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY

REGION, 2017–2019 (USD MILLION)

TABLE 55 LIGHTING: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2020–2025 (USD MILLION)

10.2.2.3 Seat control

10.2.2.3.1 Heated Seats

10.2.2.3.2 Seat Adjustment

TABLE 56 SEAT CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2017–2019 (MILLION UNITS)

TABLE 57 SEAT CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2020–2025 (MILLION UNITS)

TABLE 58 SEAT CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2017–2019 (USD MILLION)

TABLE 59 SEAT CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2020–2025 (USD MILLION)

10.2.2.4 HVAC

TABLE 60 HVAC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION,
2017–2019 (MILLION UNITS)

TABLE 61 HVAC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION,
2020–2025 (MILLION UNITS)

TABLE 62 HVAC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION,
2017–2019 (USD MILLION)

TABLE 63 HVAC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION,
2020–2025 (USD MILLION)

10.2.2.5 Start-stop module

TABLE 64 START-STOP MODULE: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 65 START-STOP MODULE: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 66 START-STOP MODULE: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 67 START-STOP MODULE: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.3 INFOTAINMENT

TABLE 68 INFOTAINMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
SUB-APPLICATION, 2017–2019 (MILLION UNITS)

TABLE 69 INFOTAINMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
SUB-APPLICATION, 2020–2025 (MILLION UNITS)

TABLE 70 INFOTAINMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
SUB-APPLICATION, 2017–2019 (USD MILLION)

TABLE 71 INFOTAINMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (USD MILLION)

10.2.3.1 Instrument cluster

TABLE 72 INSTRUMENT CLUSTER: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 73 INSTRUMENT CLUSTER: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 74 INSTRUMENT CLUSTER: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 75 INSTRUMENT CLUSTER: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.3.2 Audio System

TABLE 76 AUDIO SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 77 AUDIO SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 78 AUDIO SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 79 AUDIO SYSTEM: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.4 TELEMATICS

TABLE 80 TELEMATICS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (MILLION UNITS)

TABLE 81 TELEMATICS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (MILLION UNITS)

TABLE 82 TELEMATICS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (USD MILLION)

TABLE 83 TELEMATICS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (USD MILLION)

10.2.4.1 Vehicle management

TABLE 84 VEHICLE MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 85 VEHICLE MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 86 VEHICLE MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 87 VEHICLE MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.4.2 V2X

TABLE 88 V2X: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 89 V2X: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 90 V2X: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 91 V2X: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.5 ENGINE MANAGEMENT & POWERTRAIN

TABLE 92 ENGINE MANAGEMENT & POWERTRAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (MILLION UNITS)

TABLE 93 ENGINE MANAGEMENT & POWERTRAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (MILLION UNITS)

TABLE 94 ENGINE MANAGEMENT & POWERTRAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2017–2019 (USD MILLION)

TABLE 95 ENGINE MANAGEMENT & POWERTRAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY SUB-APPLICATION, 2020–2025 (USD MILLION)

10.2.5.1 Engine control

TABLE 96 ENGINE CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 97 ENGINE CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 98 ENGINE CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 99 ENGINE CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.5.2 Transmission control

TABLE 100 TRANSMISSION CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 101 TRANSMISSION CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 102 TRANSMISSION CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 103 TRANSMISSION CONTROL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

10.2.6 BATTERY MANAGEMENT

TABLE 104 BATTERY MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 105 BATTERY MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS

MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 106 BATTERY MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 107 BATTERY MANAGEMENT: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2020–2025 (USD MILLION)

10.3 KEY INDUSTRY INSIGHTS

11 AUTOMOTIVE POWER ELECTRONICS MARKET, BY COMPONENT TYPE

11.1 INTRODUCTION

FIGURE 38 SYSTEM BLOCK DIAGRAM

FIGURE 39 SENSOR TO DOMINATE THE AUTOMOTIVE POWER ELECTRONICS
MARKET

BY 2025 (USD MILLION)

TABLE 108 AUTOMOTIVE POWER ELECTRONICS MARKET, BY COMPONENT
TYPE, 2017–2019 (MILLION UNITS)

TABLE 109 AUTOMOTIVE POWER ELECTRONICS MARKET, BY COMPONENT
TYPE, 2020–2025 (MILLION UNITS)

TABLE 110 AUTOMOTIVE POWER ELECTRONICS MARKET, BY COMPONENT
TYPE, 2017–2019 (USD MILLION)

TABLE 111 AUTOMOTIVE POWER ELECTRONICS MARKET, BY COMPONENT
TYPE, 2020–2025 (USD MILLION)

11.1.1 ASSUMPTIONS

11.1.2 RESEARCH METHODOLOGY FOR COMPONENT TYPE

11.2 SENSOR

TABLE 112 SENSOR: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2017–2019 (MILLION UNITS)

TABLE 113 SENSOR: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2020–2025 (MILLION UNITS)

TABLE 114 SENSOR: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2017–2019 (USD MILLION)

TABLE 115 SENSOR: AUTOMOTIVE POWER ELECTRONICS MARKET, BY
REGION, 2020–2025 (USD MILLION)

11.3 MICROCONTROLLER

TABLE 116 MICROCONTROLLER: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 117 MICROCONTROLLER: AUTOMOTIVE POWER ELECTRONICS
MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 118 MICROCONTROLLER: AUTOMOTIVE POWER ELECTRONICS

MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 119 MICROCONTROLLER: AUTOMOTIVE POWER ELECTRONICS

MARKET, BY REGION, 2020–2025 (USD MILLION)

11.4 KEY INDUSTRY INSIGHTS

12 AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE

12.1 INTRODUCTION

FIGURE 40 PASSENGER VEHICLE SEGMENT TO DOMINATE THE AUTOMOTIVE POWER ELECTRONICS MARKET BY 2025 (USD MILLION)

TABLE 120 AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE, 2017–2019 (MILLION UNITS)

TABLE 121 AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE, 2020–2025 (MILLION UNITS)

TABLE 122 AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE, 2017–2019 (USD MILLION)

TABLE 123 AUTOMOTIVE POWER ELECTRONICS MARKET, BY VEHICLE TYPE, 2020–2025 (USD MILLION)

12.1.1 ASSUMPTIONS

12.1.2 RESEARCH METHODOLOGY FOR VEHICLE TYPE

12.2 VEHICLE TYPE

12.2.1 PASSENGER VEHICLE

TABLE 124 PASSENGER VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 125 PASSENGER VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 126 PASSENGER VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 127 PASSENGER VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

12.2.2 LIGHT COMMERCIAL VEHICLE

TABLE 128 LIGHT COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 129 LIGHT COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 130 LIGHT COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 131 LIGHT COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

12.2.3 HEAVY COMMERCIAL VEHICLE

TABLE 132 HEAVY COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 133 HEAVY COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 134 HEAVY COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 135 HEAVY COMMERCIAL VEHICLE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

12.3 KEY INDUSTRY INSIGHTS

13 AUTOMOTIVE POWER ELECTRONICS MARKET, BY ELECTRIC VEHICLE TYPE

13.1 INTRODUCTION

13.1.1 BATTERY MANAGEMENT SYSTEM (BMS)

13.1.2 ON-BOARD CHARGER (OBC)

13.1.3 MOTOR

13.1.4 AC-DC, DC-AC & DC-DC CONVERTER

13.1.5 ASSUMPTIONS

13.1.6 RESEARCH METHODOLOGY FOR ELECTRIC VEHICLE TYPE

FIGURE 41 AUTOMOTIVE POWER ELECTRONICS MARKET FOR ELECTRIC VEHICLE, BY APPLICATION, 2020-2025 (USD MILLION)

TABLE 136 AUTOMOTIVE POWER ELECTRONICS MARKET FOR ELECTRIC VEHICLE, BY APPLICATION, 2017–2019 (USD MILLION)

TABLE 137 AUTOMOTIVE POWER ELECTRONICS MARKET FOR ELECTRIC VEHICLE, BY APPLICATION, 2020–2025 (USD MILLION)

13.2 BATTERY ELECTRIC VEHICLES

TABLE 138 BATTERY ELECTRIC VEHICLES: AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION, 2017–2019 (USD MILLION)

TABLE 139 BATTERY ELECTRIC VEHICLES: AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION, 2020–2025 (USD MILLION)

13.3 HYBRID ELECTRIC VEHICLES

13.4 PLUG-IN HYBRID ELECTRIC VEHICLES

TABLE 140 PHEVS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION, 2017–2019 (USD MILLION)

TABLE 141 PHEVS: AUTOMOTIVE POWER ELECTRONICS MARKET, BY APPLICATION, 2020–2025 (USD MILLION)

13.5 KEY INDUSTRY INSIGHTS

14 AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION

14.1 INTRODUCTION

FIGURE 42 AVERAGE SELLING PRICE TREND FOR THE AUTOMOTIVE POWER ELECTRONICS MARKET

FIGURE 43 ASIA PACIFIC TO DOMINATE THE AUTOMOTIVE POWER ELECTRONICS MARKET

TABLE 142 AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (MILLION UNITS)

TABLE 143 AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (MILLION UNITS)

TABLE 144 AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2017–2019 (USD MILLION)

TABLE 145 AUTOMOTIVE POWER ELECTRONICS MARKET, BY REGION, 2020–2025 (USD MILLION)

14.1.1 ASSUMPTIONS

14.1.2 RESEARCH METHODOLOGY FOR REGION

14.2 ASIA PACIFIC

FIGURE 44 ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET SNAPSHOT

TABLE 146 ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (MILLION UNITS)

TABLE 147 ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (MILLION UNITS)

TABLE 148 ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (USD MILLION)

TABLE 149 ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

14.2.1 IMPACT OF COVID-19 ON THE ASIA PACIFIC AUTOMOTIVE POWER ELECTRONICS MARKET

14.2.2 CHINA

14.2.2.1 Increasing vehicle production will drive the Chinese market

14.2.2.2 China vehicle production data

14.2.2.3 China: Decline in vehicle production due to COVID-19

TABLE 150 CHINA: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.2.2.4 China: Decline in vehicle sales due to COVID-19

TABLE 151 CHINA: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 152 CHINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 153 CHINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 154 CHINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 155 CHINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.2.3 JAPAN

14.2.3.1 Thriving semiconductors market to drive the demand for high-tech automotive power electronics in Japan

14.2.3.2 Japan: Decline in vehicle production due to COVID-19

TABLE 156 JAPAN: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.2.3.3 Japan: Decline in vehicle sales due to COVID-19

TABLE 157 JAPAN: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 158 JAPAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 159 JAPAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 160 JAPAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 161 JAPAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.2.4 INDIA

14.2.4.1 Implementation of vehicle passive safety norms will drive the Indian market

14.2.4.2 India: Decline in vehicle production due to COVID-19

TABLE 162 INDIA: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.2.4.3 India: Decline in vehicle sales due to COVID-19

TABLE 163 INDIA: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 164 INDIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 165 INDIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 166 INDIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 167 INDIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.2.5 SOUTH KOREA

14.2.5.1 Increasing sales of LCVs will drive the South Korean market

TABLE 168 SOUTH KOREA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 169 SOUTH KOREA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 170 SOUTH KOREA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 171 SOUTH KOREA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.2.6 THAILAND

14.2.6.1 Improved tax exemption policies will drive the Thai market

TABLE 172 THAILAND: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 173 THAILAND: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 174 THAILAND: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 175 THAILAND: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.2.7 REST OF ASIA PACIFIC

14.2.7.1 Improving FDI policies in these countries will drive the Rest of Asia Pacific market

TABLE 176 REST OF ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 177 REST OF ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 178 REST OF ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 179 REST OF ASIA PACIFIC: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3 EUROPE

FIGURE 45 EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET SNAPSHOT

TABLE 180 EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (MILLION UNITS)

TABLE 181 EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY

COUNTRY, 2020–2025 (MILLION UNITS)

TABLE 182 EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (USD MILLION)

TABLE 183 EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

14.3.1 IMPACT OF COVID-19 ON THE EUROPEAN AUTOMOTIVE POWER ELECTRONICS MARKET

14.3.2 GERMANY

14.3.2.1 Installation of automotive power electronics in mid-size and economy class vehicle will drive the German market

14.3.2.2 Germany: Decline in vehicle production due to COVID-19

TABLE 184 GERMANY: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.3.2.3 Germany: Decline in vehicle sales due to COVID-19

TABLE 185 GERMANY: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 186 GERMANY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 187 GERMANY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 188 GERMANY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 189 GERMANY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3.3 FRANCE

14.3.3.1 Partnerships and collaborations among OEMs and Tier I suppliers will drive the French market

14.3.3.2 France: Decline in vehicle production due to COVID-19

TABLE 190 FRANCE: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.3.3.3 France: Decline in vehicle sales due to COVID-19

TABLE 191 FRANCE: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 192 FRANCE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 193 FRANCE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 194 FRANCE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 195 FRANCE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3.4 UK

14.3.4.1 Continuous R&D in vehicle electronics will drive the UK market

14.3.4.2 UK: Decline in vehicle production due to COVID-19

TABLE 196 UK: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.3.4.3 UK: Decline in vehicle sales due to COVID-19

TABLE 197 UK: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 198 UK: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 199 UK: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 200 UK: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 201 UK: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3.5 SPAIN

14.3.5.1 Continuous export of luxury vehicles will drive the Spanish market

14.3.5.2 Spain: Decline in vehicle production due to COVID-19

TABLE 202 SPAIN: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.3.5.3 Spain: Decline in vehicle sales due to COVID-19

TABLE 203 SPAIN: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 204 SPAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 205 SPAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 206 SPAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 207 SPAIN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3.6 RUSSIA

14.3.6.1 Investments in the automotive industry by major automobile manufacturers will drive the Russian market

14.3.6.2 Russia: Decline in vehicle production due to COVID-19

TABLE 208 RUSSIA: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 209 RUSSIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 210 RUSSIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 211 RUSSIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 212 RUSSIA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3.7 TURKEY

14.3.7.1 Improved business policies will drive the Turkish market

14.3.7.2 Turkey: Decline in vehicle production due to COVID-19

TABLE 213 TURKEY: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.3.7.3 Turkey: Decline in vehicle sales due to COVID-19

TABLE 214 TURKEY: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 215 TURKEY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 216 TURKEY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 217 TURKEY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 218 TURKEY: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.3.8 REST OF EUROPE

14.3.8.1 Flourishing Eastern European automotive industry will boost the market

TABLE 219 REST OF EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 220 REST OF EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 221 REST OF EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 222 REST OF EUROPE: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.4 NORTH AMERICA

14.4.1 IMPACT OF COVID-19 ON THE NORTH AMERICAN AUTOMOTIVE POWER ELECTRONICS MARKET

TABLE 223 NORTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (MILLION UNITS)

TABLE 224 NORTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (MILLION UNITS)

TABLE 225 NORTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (USD MILLION)

TABLE 226 NORTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

14.4.2 CANADA

14.4.2.1 Increasing sales of luxury class vehicles will boost the Canadian market

14.4.2.2 Canada: Decline in vehicle production due to COVID-19

TABLE 227 CANADA: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.4.2.3 Canada: Decline in vehicle sales due to COVID-19

TABLE 228 CANADA: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 229 CANADA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 230 CANADA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 231 CANADA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 232 CANADA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.4.3 MEXICO

14.4.3.1 Increasing sales of LCVs will boost the Mexican market

14.4.3.2 Mexico: Decline in vehicle production due to COVID-19

TABLE 233 MEXICO: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.4.3.3 Mexico: Decline in vehicle sales due to COVID-19

TABLE 234 MEXICO: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 235 MEXICO: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 236 MEXICO: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 237 MEXICO: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 238 MEXICO: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.4.4 US

14.4.4.1 Launch of new vehicle models and changing import-export policies to drive the US market

14.4.4.2 US: Decline in vehicle production due to COVID-19

TABLE 239 US: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.4.4.3 US: Decline in vehicle sales due to COVID-19

TABLE 240 US: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 241 US: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 242 US: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 243 US: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 244 US: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.5 SOUTH AMERICA

14.5.1 IMPACT OF COVID-19 ON THE SOUTH AMERICAN AUTOMOTIVE POWER ELECTRONICS MARKET

TABLE 245 SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (MILLION UNITS)

TABLE 246 SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (MILLION UNITS)

TABLE 247 SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (USD MILLION)

TABLE 248 SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

14.5.2 BRAZIL

14.5.2.1 Improving government policies to drive the Brazilian market

14.5.2.2 Brazil: Decline in vehicle production due to COVID-19

TABLE 249 BRAZIL: Q1 VEHICLE PRODUCTION DATA COMPARISON (UNITS), 2019 VS. 2020

14.5.2.3 Brazil: Decline in vehicle sales due to COVID-19

TABLE 250 BRAZIL: Q1 VEHICLE SALES DATA COMPARISON (UNITS), 2019 VS. 2020

TABLE 251 BRAZIL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 252 BRAZIL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 253 BRAZIL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE

TYPE, 2017–2019 (USD MILLION)

TABLE 254 BRAZIL: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.5.3 ARGENTINA

14.5.3.1 Increasing vehicle production will drive the Argentinian market

TABLE 255 ARGENTINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 256 ARGENTINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 257 ARGENTINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 258 ARGENTINA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.5.4 REST OF SOUTH AMERICA

14.5.4.1 Adoption of modern technologies related to active and passive safety will drive the Rest of South American market

TABLE 259 REST OF SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 260 REST OF SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 261 REST OF SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 262 REST OF SOUTH AMERICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.6 REST OF THE WORLD (ROW)

TABLE 263 ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (MILLION UNITS)

TABLE 264 ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (MILLION UNITS)

TABLE 265 ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2017–2019 (USD MILLION)

TABLE 266 ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY COUNTRY, 2020–2025 (USD MILLION)

14.6.1 IRAN

14.6.1.1 Increasing sales of luxury class vehicles will drive the Iranian market

TABLE 267 IRAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 268 IRAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 269 IRAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 270 IRAN: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.6.2 SOUTH AFRICA

14.6.2.1 Expansions of global OEMs and Tier I suppliers will drive the South African market

TABLE 271 SOUTH AFRICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 272 SOUTH AFRICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 273 SOUTH AFRICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 274 SOUTH AFRICA: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.6.3 OTHERS IN ROW

14.6.3.1 Government initiatives related to vehicle passive safety to drive the market

TABLE 275 OTHERS IN ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (MILLION UNITS)

TABLE 276 OTHERS IN ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (MILLION UNITS)

TABLE 277 OTHERS IN ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2017–2019 (USD MILLION)

TABLE 278 OTHERS IN ROW: AUTOMOTIVE POWER ELECTRONICS MARKET, BY DEVICE TYPE, 2020–2025 (USD MILLION)

14.7 KEY INDUSTRY INSIGHTS

15 COMPETITIVE LANDSCAPE

15.1 OVERVIEW

15.2 MARKET EVALUATION FRAMEWORK

FIGURE 46 MARKET EVALUATION FRAMEWORK: AUTOMOTIVE POWER ELECTRONICS MARKET

15.3 MARKET RANKING ANALYSIS

FIGURE 47 MARKET LEADERS AND MARKET SHARE ANALYSIS: AUTOMOTIVE POWER ELECTRONICS MARKET

15.4 RIGHT TO WIN: AUTOMOTIVE POWER ELECTRONICS SUPPLIERS

TABLE 279 RIGHT TO WIN: AUTOMOTIVE POWER ELECTRONICS SUPPLIERS

15.5 COMPETITIVE LEADERSHIP MAPPING

15.5.1 STARS**15.5.2 EMERGING LEADERS****15.5.3 PERVASIVE****15.5.4 EMERGING COMPANIES**

**FIGURE 48 GLOBAL AUTOMOTIVE POWER ELECTRONICS MARKET:
COMPETITIVE LEADERSHIP MAPPING, 2020**

15.6 WINNERS VS. TAIL-ENDERS

**FIGURE 49 KEY DEVELOPMENTS BY LEADING PLAYERS IN THE MARKET,
2018–2020**

15.7 COMPETITIVE SCENARIO**15.7.1 NEW PRODUCT DEVELOPMENTS**

TABLE 280 NEW PRODUCT DEVELOPMENTS, 2019–2020

15.7.2 EXPANSIONS

TABLE 281 EXPANSIONS, 2018-2020

15.7.3 MERGERS & ACQUISITIONS

TABLE 282 MERGERS & ACQUISITIONS, 2019-2020

**15.7.4 PARTNERSHIPS/AGREEMENTS/COLLABORATIONS/ SUPPLY
CONTRACTS**

**TABLE 283 PARTNERSHIPS/AGREEMENT/COLLABORATIONS/SUPPLY
CONTRACTS, 2019**

**16 COMPANY PROFILES 232(BUSINESS OVERVIEW, PRODUCTS OFFERED,
RECENT DEVELOPMENTS, SWOT ANALYSIS, MNM VIEW)***

16.1 ROBERT BOSCH

FIGURE 50 COMPANY SNAPSHOT: ROBERT BOSCH

TABLE 284 ROBERT BOSCH: KEY FINANCIALS

TABLE 285 PRODUCTS OFFERED: ROBERT BOSCH

FIGURE 51 ROBERT BOSCH: SWOT ANALYSIS

16.2 CONTINENTAL

FIGURE 52 CONTINENTAL: COMPANY SNAPSHOT

TABLE 286 CONTINENTAL: KEY FINANCIALS

TABLE 287 PRODUCTS OFFERED: CONTINENTAL

**TABLE 288 CONTINENTAL: ORGANIC GROWTH STRATEGIES (NEW PRODUCT
DEVELOPMENTS/EXPANSIONS)**

**TABLE 289 CONTINENTAL: INORGANIC GROWTH STRATEGIES
(M&A/AGREEMENTS/ COLLABORATIONS/JOINT VENTURES/SUPPLY
CONTRACTS)**

FIGURE 53 CONTINENTAL: SWOT ANALYSIS

16.3 INFINEON

FIGURE 54 INFINEON: COMPANY SNAPSHOT

TABLE 290 INFINEON: KEY FINANCIALS

TABLE 291 PRODUCTS OFFERED: INFINEON

TABLE 292 INFINEON: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/ EXPANSIONS)

TABLE 293 INFINEON: INORGANIC GROWTH STRATEGIES (M&A/AGREEMENTS/COLLABORATIONS/JOINT VENTURES/ SUPPLY CONTRACTS)

FIGURE 55 INFINEON: SWOT ANALYSIS

16.4 STMICROELECTRONICS

FIGURE 56 COMPANY SNAPSHOT: STMICROELECTRONICS

TABLE 294 STMICROELECTRONICS: KEY FINANCIALS

TABLE 295 PRODUCTS OFFERED: STMICROELECTRONICS

TABLE 296 STMICROELECTRONICS: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/EXPANSIONS)

TABLE 297 STMICROELECTRONICS: INORGANIC GROWTH STRATEGIES (M&A/AGREEMENTS/ COLLABORATIONS/JOINT VENTURES/ SUPPLY CONTRACTS)

FIGURE 57 STMICROELECTRONICS: SWOT ANALYSIS

16.5 ON SEMICONDUCTOR

FIGURE 58 COMPANY SNAPSHOT: ON SEMICONDUCTOR

TABLE 298 ON SEMICONDUCTOR: KEY FINANCIALS

TABLE 299 PRODUCTS OFFERED: ON SEMICONDUCTOR

TABLE 300 ON SEMICONDUCTOR: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/EXPANSIONS)

FIGURE 59 ON SEMICONDUCTOR: SWOT ANALYSIS

16.6 MITSUBISHI ELECTRIC

FIGURE 60 MITSUBISHI ELECTRIC: COMPANY SNAPSHOT

TABLE 301 MITSUBISHI ELECTRIC: KEY FINANCIALS

TABLE 302 MITSUBISHI ELECTRIC: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/EXPANSIONS)

TABLE 303 PRODUCTS OFFERED: MITSUBISHI ELECTRIC

16.7 RENESAS

FIGURE 61 RENESAS: COMPANY SNAPSHOT

TABLE 304 RENESAS: KEY FINANCIALS

TABLE 305 PRODUCTS OFFERED: RENESAS

TABLE 306 RENESAS: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/EXPANSIONS)

16.8 FUJI ELECTRIC

FIGURE 62 FUJI ELECTRIC: COMPANY SNAPSHOT

TABLE 307 FUJI ELECTRIC: KEY FINANCIALS

TABLE 308 PRODUCTS OFFERED: FUJI ELECTRIC

16.9 DELPHI TECHNOLOGIES

FIGURE 63 DELPHI TECHNOLOGIES: COMPANY SNAPSHOT

TABLE 309 DELPHI TECHNOLOGIES: KEY FINANCIALS

TABLE 310 PRODUCTS OFFERED: DELPHI TECHNOLOGIES

TABLE 311 DELPHI TECHNOLOGIES: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/EXPANSIONS)

16.10 DANFOSS

FIGURE 64 DANFOSS: COMPANY SNAPSHOT

TABLE 312 DANFOSS: KEY FINANCIALS

TABLE 313 PRODUCTS OFFERED: DANFOSS

TABLE 314 DANFOSS: ORGANIC GROWTH STRATEGIES (NEW PRODUCT DEVELOPMENTS/EXPANSIONS)

*Details on Business overview, Products offered, Recent Developments, SWOT analysis, MNM view might not be captured in case of unlisted companies.

16.11 OTHER MAJOR PLAYERS

16.11.1 NORTH AMERICA

16.11.1.1 Vishay

16.11.1.2 Maxim Integrated

16.11.1.3 Microchip Technology

16.11.1.4 Littelfuse

16.11.1.5 Silicon Labs

16.11.1.6 BorgWarner

16.11.1.7 ABB

16.11.1.8 Analog Devices

16.11.1.9 Texas Instruments

16.11.1.10 Diodes Incorporated

16.11.1.11 Power Integrations

16.11.1.12 Vicor Power

16.11.2 EUROPE

16.11.2.1 NXP Semiconductor

16.11.2.2 Nexperia

16.11.2.3 Eaton

16.11.2.4 Valeo

16.11.2.5 Hella

16.11.2.6 Actia

- 16.11.2.7 SEMIKRON
- 16.11.2.8 Dialog Semiconductor
- 16.11.2.9 Marelli
- 16.11.2.10 Ascatron
- 16.11.3 ASIA PACIFIC
 - 16.11.3.1 ROHM Semiconductor
 - 16.11.3.2 Taiwan Semiconductor
 - 16.11.3.3 Pulse
 - 16.11.3.4 Delta

17 APPENDIX

- 17.1 DISCUSSION GUIDE
- 17.2 KNOWLEDGE STORE: MARKETSANDMARKETS SUBSCRIPTION PORTAL
- 17.3 AVAILABLE CUSTOMIZATIONS
- 17.4 RELATED REPORTS
- 17.5 AUTHOR DETAILS

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