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Driveline Market for Electric & Hybrid Vehicle by Architecture (Series, Parallel, Power split), Transmission (AT, DCT, E-CVT), Motor Output (45-100, 101-250, >250kW), Final Drive, Drive Type, Power Electronics, Vehicle Type, Region - Global Forecast to 2025

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Abstracts

“Increasing demand for electric & hybrid vehicles to boost the driveline market during the forecast period”

The driveline market for electric and hybrid vehicles is projected to grow from USD 18.14 billion in 2017 to USD 63.32 billion by 2025, at a CAGR of 16.92% CAGR. The market is projected to rise due to key reasons such as increasing demand for the electric and hybrid vehicle and advancement in driveline technologies such as E-CVT and E-axle.

On the other hand, the major factors hindering the growth of the driveline market for electric and hybrid vehicle are the high cost of electric and hybrid driveline as compared to the conventional driveline.

“E-axle market is estimated to showcase the fastest growth in final drive segment”

E-axles and differentials are used in the driveline as the end components to transmit the motor power to the wheels. E-axle helps in reducing the weight and improving the efficiency of electric vehicles. However, it is a very advanced and expensive technology. Although the application of E-axles is at a nascent stage at present, E-axles are likely to gain the market share during the forecast period owing to their benefits associated with

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improving the range covered and noise reduction, among others. The need for high power applications has contributed to the growing demand for 48 V and more high powered architectures. All these higher voltage architecture technologies are likely to create a tremendous demand for E-axle systems in the future. E-axles would have a huge impact on the future driveline market due to their benefits such as weight reduction and improving the efficiency of electric vehicles.

“Motor with power output of 45–100 kW is estimated to have the largest share in driveline market for electric and hybrid vehicle”

Motor performance is measured by its output, which is known as traction output. Motor output varies from 12 kW to more than 250kW, depending on the vehicle specification. The motor which generates output in between 45kW and 100kW is generally used in small electric and hybrid cars. These types of electric and hybrid cars have the largest market in Asia Oceania region due to its cost-effectiveness. China is expected to be the largest market for motors with an output range of 45kW to 100kW, followed by Japan and South Korea. Toyota is the leading OEM in the electric and hybrid driveline equipped with the motor that gives a power output of 45kW to 100kW.

“Asia Oceania and North America to dominate the market growth”

Asia Oceania and North America are estimated to dominate the driveline market for the electric and hybrid vehicle during the forecast period. While Asia Oceania is estimated to be the fastest growing as well as the largest market, North America is estimated to be the second largest market during the forecast period. The high cost of hybrid and electric vehicles is a major challenge for OEMs. However, governments of various countries in Asia Oceania offer incentives to increase the adoption of green technologies, which is expected to drive the demand for electric and hybrid driveline systems. The Chinese government is providing acquisition tax and excise tax exemption (depending on engine displacement and price) (USD 5,100 to USD 8,700). Going forward, the increasing trend of electrification and hybridization will increase the demand for electric and hybrid drivelines in North America.

The study contains insights provided by various industry experts. The break-up of the primaries is as follows:

By Company Type – Tier-1 - 60%, Tier-2 - 20%, and OEMs- 20%

By Designation — Manager level - 60%, C level - 25 %, Other- 15%

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By Region — North America - 25%, Europe - 30%, Asia Oceania - 45%,

The key companies profiled in the study are ZF (Germany), Schaeffler (Germany), GKN (UK), BorgWarner (US), Robert Bosch (Germany), Delphi (UK), Denso (Japan), Hitachi (Japan), Valeo (France), AVL (Austria), and Continental (Germany).

Research Coverage

The report covers the driveline market for electric and hybrid vehicles. It is broadly segmented by region (Asia Pacific, Europe, North America, and RoW), architecture type (series driveline, parallel driveline, power split driveline, and EV driveline), power electronics (inverter, converter, and power control unit), final drive (differential and E-axle), transmission (automatic transmission, dual clutch transmission, and E-CVT), motor output (45–100kW, 101–250kW, and 250kW), drive type (FWD, RWD, and AWD), and vehicle type (BEV, HEV, and PHEV).

Reasons to Buy the Report:

The report provides insights with reference to the following points:

Market Size: The report gives in-depth market sizing and forecasts up to eight years.

Market by architecture: The report covers the driveline market for electric and hybrid vehicles by the driveline architecture namely, series, parallel, and power split

Upcoming technologies: The study covers existing and upcoming technologies for driveline systems, such as PCU (power control unit) and e-axle etc.

Market Development: The report provides comprehensive information about lucrative emerging markets. The report analyzes the driveline market for electric and hybrid vehicle across regions.

Product Development/Innovation: The report gives detailed insights into R&D activities, upcoming technologies, and new product launches in the driveline market for electric and hybrid vehicle.

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Market Diversification: The report offers detailed information about untapped markets, investments, new products, and recent developments in the driveline market for electric and hybrid vehicle.

Company profiled: The report provides detailed information and in-depth analysis of key players of electric and hybrid driveline based on their business strategy excellence and strength of product portfolio.

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Contents

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*Details on Overview, Product offerings, SWOT Analysis, MnM View might not be captured in case of unlisted companies.

16 APPENDIX

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16.7 AUTHOR DETAILS

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List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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