

Electric Commercial Vehicle Traction Motor Market by Vehicle Type (Pickups, Medium and Heavy-Duty Trucks, Vans, Buses), Power Output, Motor Type, Transmission, Design, Axle Architecture (Integrated, Central Drive Unit), & Region - Global Forecast to 2030

<https://marketpublishers.com/r/EFD70B2DBDACEN.html>

Date: May 2024

Pages: 253

Price: US\$ 4,950.00 (Single User License)

ID: EFD70B2DBDACEN

Abstracts

The global electric commercial vehicles market is projected to grow from USD 2.1 Billion in 2024 to USD 9.8 Billion by 2030, registering a CAGR of 28.8%. The ECV traction motor industry is expanding rapidly, driven by a global shift toward sustainability and electrification. With stringent emissions rules and rising environmental awareness, industries are increasingly adopting electric and hybrid vehicles, driving up demand for ECV traction motors. Advances in technology and government incentives have accelerated this growth trajectory, making ECV traction motors an essential component in the transition to a greener future. As the market grows, ECV traction motors will play an increasingly important role in changing the transportation landscape, providing efficient and environmentally friendly solutions across a wide range of sectors.

“Reduced mechanical complexity and power loss to drive growth of single-speed drive transmission.”

A single-speed drive in traction motors is a motor arrangement that has a fixed gear ratio. In this design, the motor directly powers the vehicle's wheels, eliminating the need for a complex transmission system. Single-speed drive motors are appropriate for urban driving circumstances commonly found in commercial vehicle applications that require constant speed operation, such as stop-and-go traffic. Single-speed drive motors help to increase the overall efficiency and reliability of electric commercial vehicles. While these motors offer simplicity and economy appropriate for urban driving, they may have limits in specific scenarios, such as high-speed highway driving or applications that

require precise control of vehicle speed. Single-speed traction motors are still prevalent in some electric commercial vehicles, such as the Ford e-Transit electric van by Ford Motor Company (US), which features a single-speed transmission electric motor that is powered by a 68 kWh lithium-ion battery pack with a demonstrated range of 126 miles on the Cargo Van low-roof models. American Axle & Manufacturing Holdings, Inc. (US), BorgWarner (US), Robert Bosch GmbH (Germany), and Dana Incorporated (US) also supply drive motors, eAxles, electric powertrain systems, and electric powertrain system parts. Thus, single-speed drive motors remain a practical choice for electric commercial vehicles seeking streamlined and efficient propulsion solutions tailored to urban environments.

“Booming logistics sector to drive growth of Van in ECV traction motor market.”

Demand for effective and adaptable logistics solutions has surged as a result of e-commerce's rapid growth. Traction motors power electric trucks used for last-mile delivery, allowing logistics organizations to satisfy the growing demand for fast and dependable parcel delivery services. Electric vans are enclosed wagons or motor truck vehicles that receive power from the power grid and are driven by an electric motor. The growth of the logistics and e-commerce sectors is expected to drive the market for electric vans for various applications, including last-mile delivery and distribution services. In September 2023, FedEx Express Europe, a subsidiary of FedEx Corporation, announced the addition of 23 Mercedes-Benz eSprinter vans to its UK operations. These eSprinter vans use two electric motors to power the vehicle mounted at the rear axle. Electric vans would witness an increasing demand due to lower operating costs, negligible harmful emissions, and government support. With the growing demand for electrification of mass transit transport and developments in battery technologies, pure electric vans were introduced in the market. OEMs such as Schaeffler Group (Germany), Shenzhen Inovance Technology (China), and Dana Incorporated (US), among others, offer different motors for electric vans. For instance, Spicer Electrified Zero-6 e-Transmissions, eBeam Axle, and LD34 are some traction motors offered by Dana Incorporated, ZF Friedrichshafen AG, and Shenzhen Inovance Technology, respectively.

“Optimized weight distribution within vehicles to drive Central Drive Axle market during the forecast period.”

In the rapidly growing electric commercial vehicle market, the central drive axle emerges as a key component enhancing vehicle propulsion and performance. Positioned between the front and rear axles, the central drive axle optimizes weight

distribution, stability, and traction, essential for commercial operations. Its strategic placement allows for efficient power delivery to the wheels, improving vehicle maneuverability, particularly in urban environments where tight spaces and frequent stops are prevalent. Central drive axles are well-suited for articulated buses and heavy-duty trucks with trailers. Placing the motor in the center simplifies drivetrain design for these longer vehicles with complex turning mechanisms. Advancements in electric motor technology are further leading to the development of more compact and powerful central drive motors. This allows for easier integration into the central axle without sacrificing performance or ground clearance. The CeTrax system by ZF Friedrichshafen AG (Germany) is an all-electric central drive used in buses, trucks, and special vehicles, such as terminal tractors and body carriers. CeTrax saves on costs and reduces the workload involved in technical integration and service.

“Advancements in motor design to drive growth of Permanent magnet synchronous motors (PMSMs) during the forecast period.”

The growing popularity of PMSMs in electric commercial vehicles is attributed to their performance and an increase in electrification and sustainability in the automotive industry. Major manufacturers such as Tesla (US), BMW (Germany), and Nissan Motor Co. Ltd. (Japan) have adopted this technology in their electric vehicle platforms, leveraging its efficiency and power density to enhance the overall driving experience and appeal to environmentally-conscious consumers. Advancements in motor design and manufacturing processes have made these motors more cost-effective and accessible, further driving their adoption in electric commercial vehicles, including delivery vans, buses, and light-duty trucks. Traction motor manufacturers such as Dana Incorporated (US), American Axle & Manufacturing Inc. (US), and FinDreams Powertrain Co., Ltd. (China) (a subsidiary of BYD) offer a wide range of PMSMs for commercial vehicles. For instance, Dana offers TM4 SUMO LD for light commercial vehicles, medium-duty trucks, medium buses, and heavy-duty trucks when integrated into e-Axles. Similarly, in January 2022, FinDreams Powertrain announced the release of its second-generation 3-in-1 150 kW electric drive system. With a power range of 120 and 180 kW, the system includes a PMSM and provides a maximum wheel torque range between 3,000 and 3,800 Nm.

Electric commercial vehicle manufacturers such as Tesla Ins. (US), BYD (China), Volvo Trucks (Sweden), and Mercedes-Benz Group AG (Germany), among others, also use PMSMs in their electric commercial vehicles. For instance, the Tesla Semi, an all-electric heavy-duty truck, uses a liquid-cooled AC permanent magnet synchronous motor with a variable frequency drive. Meanwhile, the Mercedes-Benz eSprinter electric

van utilizes a PMSM for its efficient and powerful electric drive system. Thus, the growing adoption of electric commercial vehicles with PMSM will support the market growth of the electric commercial vehicle traction motor market.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in this market.

By Company Type: OEMs – 25%, Tier I – 55%, Tier II– 20%,

By Designation: CXOs – 20%, Directors– 30%, Others– 50%

By Region: North America– 20%, Europe – 20%, Asia Pacific– 60%

The electric commercial vehicle traction motor market is dominated by global players such as ZF Friedrichshafen AG (Germany), Dana Limited (US), Robert Bosch GmbH (Germany), Magna International Inc. (Germany), and Allison Transmission, Inc. (US). These companies adopted strategies such as product developments, deals, and others to gain traction in the market.

Research Coverage:

The Market Study Covers the electric commercial vehicle traction motor market By Vehicle Type (Medium-duty Trucks, Heavy-duty Truck, Electric Pickup Trucks, Light Vans, Full-size Vans and Buses & Coaches), Power Output (Less than 100 kW, 100?200 kW, 200–400 kW and Above 400 kW), Motor Type (Permanent Magnet Synchronous Motor (PMSM), AC Induction Motor, and DC Traction Motor), Transmission (Single Speed Drive and Multi-speed Drive), Design (Radial Flux and Axial Flux), Axle Architecture (Integrated Axle and Central Drive Unit) and Region (Asia Pacific, Europe and North America). It also covers the competitive landscape and company profiles of the major players in the electric commercial vehicle traction motor market ecosystem.

Key Benefits of the Report

The study also includes an in-depth competitive analysis of the key players in the market, along with their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

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 electric commercial vehicle traction motor market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

- **Analysis of key drivers** (Technical innovations in Motor Control and Power Electronics, The shift toward sustainable transportation is propelling the market, Lower operating costs compared to ICE engines, Government initiatives and subsidies), restraints (Vulnerability to supply chain constraints, Limited range of electric commercial vehicle), opportunities (Development in Fuel Cell technology, Rapid urbanization and fast growth of e-commerce sector), and challenges (Overheating of motor, Absence of standardized norms and regulation) influencing the growth of the electric commercial vehicle traction motor market.
- **Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product launches in the electric commercial vehicle traction motor market
- **Market Development:** Comprehensive information about lucrative markets – the report analyses the electric commercial vehicle traction motor market across varied regions
- **Market Diversification:** Exhaustive information about new products, untapped geographies, recent developments, and investments in the electric commercial vehicle traction motor market
- **Competitive Assessment:** In-depth assessment of market shares, growth strategies and service offerings of leading players like ZF Friedrichshafen AG (Germany), Dana Limited (US), Robert Bosch GmbH (Germany), Magna International Inc. (Germany), Allison Transmission, Inc. (US) and among others in the electric commercial vehicle Traction motor market strategies.
- **Strategies:** The report also helps stakeholders understand the pulse of the ECV traction motor market and provides them with information on key market drivers,

restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

TABLE 1 MARKET DEFINITION, BY VEHICLE TYPE

TABLE 2 MARKET DEFINITION, BY MOTOR TYPE

TABLE 3 MARKET DEFINITION, BY POWER OUTPUT

TABLE 4 MARKET DEFINITION, BY DESIGN

TABLE 5 MARKET DEFINITION, BY TRANSMISSION

TABLE 6 MARKET DEFINITION, BY AXLE ARCHITECTURE

1.3 INCLUSIONS AND EXCLUSIONS

TABLE 7 INCLUSIONS AND EXCLUSIONS

1.4 STUDY SCOPE

FIGURE 1 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET SEGMENTATION

1.4.1 REGIONS COVERED

1.4.2 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

TABLE 8 USD EXCHANGE RATES

1.6 UNITS CONSIDERED

1.7 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH DESIGN

FIGURE 3 REPORT WRITING METHOD

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.1.2 List of secondary sources

2.1.2 PRIMARY DATA

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

2.1.2.1 List of primary interview participants

2.2 MARKET SIZE ESTIMATION

2.2.1 BOTTOM-UP APPROACH

FIGURE 5 BOTTOM-UP APPROACH

2.2.2 TOP-DOWN APPROACH

FIGURE 6 TOP-DOWN APPROACH

FIGURE 7 RESEARCH APPROACH

FIGURE 8 MARKET ESTIMATION NOTES

2.3 DATA TRIANGULATION

FIGURE 9 DATA TRIANGULATION

2.4 FACTOR ANALYSIS

2.4.1 FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDES

2.5 RESEARCH ASSUMPTIONS

2.6 RESEARCH LIMITATIONS

2.7 RECESSION IMPACT ANALYSIS

3 EXECUTIVE SUMMARY

FIGURE 10 REPORT SUMMARY

FIGURE 11 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024 VS. 2030 (USD MILLION)

FIGURE 12 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024 VS. 2030 (UNITS)

FIGURE 13 KEY PLAYERS IN ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET

FIGURE 14 RAPID DEVELOPMENT IN ELECTRIC COMMERCIAL VEHICLES TO DRIVE MARKET

4.2 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE

FIGURE 15 LIGHT VAN SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

4.3 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY AXLE ARCHITECTURE

FIGURE 16 INTEGRATED AXLE SEGMENT TO DOMINATE MARKET DURING FORECAST PERIOD

4.4 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY DESIGN

FIGURE 17 AXIAL FLUX TO HAVE LARGER MARKET SHARE DURING FORECAST PERIOD

4.5 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY MOTOR

TYPE

FIGURE 18 PERMANENT MAGNET SYNCHRONOUS MOTOR SEGMENT TO LEAD MARKET DURING FORECAST PERIOD

4.6 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY TRANSMISSION

FIGURE 19 MULTI-SPEED DRIVE SEGMENT TO REGISTER HIGHER CAGR DURING FORECAST PERIOD

4.7 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY POWER OUTPUT

FIGURE 20 LESS THAN 100 KW SEGMENT TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

4.8 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION

FIGURE 21 ASIA PACIFIC TO ACCOUNT FOR DOMINANT MARKET SHARE IN 2024

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 22 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES

5.2.1 DRIVERS

5.2.1.1 Technological innovations in motor control and power electronics

5.2.1.2 Shift toward sustainable transportation

FIGURE 23 GLOBAL ELECTRIC COMMERCIAL VEHICLE SALES

5.2.1.3 Lower operating costs than ICE engines

TABLE 9 OPERATIONAL COST COMPARISON: ICE VS. ELECTRIC TRACTION MOTOR

5.2.1.4 Government initiatives and subsidies

TABLE 10 GOVERNMENT INCENTIVES, BY COUNTRY

5.2.2 RESTRAINTS

5.2.2.1 Vulnerability to supply chain constraints

FIGURE 24 MATERIALS USED IN TRACTION MOTORS

5.2.2.2 Limited range of electric commercial vehicles

TABLE 11 OEM VEHICLE MODELS, BY RANGE

5.2.3 OPPORTUNITIES

5.2.3.1 Development in fuel cell technology

TABLE 12 FUEL CELL ELECTRIC COMMERCIAL VEHICLE LAUNCHES SCHEDULED IN 2024-2026

5.2.3.2 Rapid urbanization and fast growth of e-commerce sector

TABLE 13 TRANSITION TOWARD ELECTRIFICATION FOR E-COMMERCE AND DELIVERY VEHICLES**5.2.4 CHALLENGES**

5.2.4.1 Overheating of motor

5.2.4.2 Absence of standardized norms and regulations

5.3 PRICING ANALYSIS

FIGURE 25 AVERAGE SELLING PRICE TREND, BY VEHICLE TYPE, 2024

FIGURE 26 AVERAGE SELLING PRICE TREND, BY REGION, 2021-2030 (USD PER UNIT)

5.4 BILL OF MATERIALS

FIGURE 27 BILL OF MATERIALS FOR ELECTRIC COMMERCIAL VEHICLE TRACTION MOTORS

5.5 SUPPLY CHAIN ANALYSIS

FIGURE 28 SUPPLY CHAIN ANALYSIS

5.6 ECOSYSTEM ANALYSIS

FIGURE 29 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET ECOSYSTEM

5.6.1 TIER II SUPPLIERS

5.6.2 TIER I SUPPLIERS

5.6.3 OEMS

TABLE 14 ROLE OF COMPANIES IN ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET ECOSYSTEM

5.7 CASE STUDY ANALYSIS

5.7.1 DESIGN OF MODULAR AXLE FOR ALL-TERRAIN HEAVY-DUTY APPLICATIONS CONSIDERING GRADIENT WEIGHT TRANSFER

5.7.2 DESIGN AND PACKAGING OF ALL-IN-ONE AXLE

5.7.3 USER EXPERIENCE OF BATTERY-ELECTRIC TRUCKS IN NORWAY

5.8 INVESTMENT SCENARIO

FIGURE 30 INVESTMENT SCENARIO, 2021-2024

TABLE 15 LIST OF FEW FUNDING, 2022-2024

5.9 PATENT ANALYSIS

5.9.1 INTRODUCTION

FIGURE 31 PATENT REGISTRATION TRENDS, 2012-2024

5.9.2 LEGAL STATUS OF PATENTS, 2012-2024

FIGURE 32 LEGAL STATUS OF PATENTS, 2012-2024

5.9.3 TOP PATENT APPLICANTS, 2012-2024

FIGURE 33 TOP PATENT APPLICANTS, 2012-2024

TABLE 16 PATENT REGISTRATIONS RELATED TO ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, 2022-2024

5.10 TECHNOLOGY ANALYSIS

5.10.1 KEY TECHNOLOGIES

5.10.1.1 Axial Flux Motors

5.10.1.2 Switched Reluctance Motors (SRMs)

5.10.1.3 Permanent Magnet Synchronous Reluctance Motors

5.10.2 ADJACENT TECHNOLOGIES

5.10.2.1 IOT in electric vehicles

5.10.2.2 Solid-state batteries

5.11 HS CODE

TABLE 17 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR IMPORT DATA FOR HS CODE 8501, BY COUNTRY, 2020–2022 (USD)

TABLE 18 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR EXPORT DATA FOR HS CODE 8501, BY COUNTRY, 2020–2022 (USD)

5.12 REGULATORY LANDSCAPE

5.12.1 COUNTRY-WISE REGULATIONS

5.12.1.1 Netherlands

TABLE 19 NETHERLANDS: EV INCENTIVES

5.12.1.2 Germany

TABLE 20 GERMANY: EV INCENTIVES

5.12.1.3 France

TABLE 21 FRANCE: EV INCENTIVES

5.12.1.4 UK

TABLE 22 UK: EV INCENTIVES

5.12.1.5 China

TABLE 23 CHINA: EV INCENTIVES

5.12.1.6 US

TABLE 24 US: EV INCENTIVES

5.12.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 25 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 26 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 27 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.13 KEY CONFERENCES AND EVENTS

TABLE 28 KEY CONFERENCES AND EVENTS, 2024?2025

5.14 KEY STAKEHOLDERS AND BUYING CRITERIA

5.14.1 KEY STAKEHOLDERS IN BUYING PROCESS

TABLE 29 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP 3 VEHICLE TYPES

5.14.2 BUYING CRITERIA

FIGURE 34 KEY BUYING CRITERIA FOR TOP 3 VEHICLE TYPES

TABLE 30 KEY BUYING CRITERIA FOR TOP 3 VEHICLE TYPE

5.15 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 35 REVENUE SHIFT AND NEW REVENUE POCKETS FOR PLAYERS IN ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET

6 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY AXLE ARCHITECTURE

6.1 INTRODUCTION

FIGURE 36 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY AXLE ARCHITECTURE, 2024 VS. 2030 (UNITS)

TABLE 31 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY AXLE ARCHITECTURE, 2019–2023 (UNITS)

TABLE 32 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY AXLE ARCHITECTURE, 2024–2030 (UNITS)

6.2 INTEGRATED AXLE

6.2.1 LOW MAINTENANCE REQUIREMENTS TO DRIVE GROWTH

TABLE 33 INTEGRATED AXLE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 34 INTEGRATED AXLE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

6.3 CENTRAL DRIVE AXLE

6.3.1 OPTIMIZED WEIGHT DISTRIBUTION WITHIN VEHICLES TO DRIVE GROWTH

TABLE 35 CENTRAL DRIVE AXLE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 36 CENTRAL DRIVE AXLE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

6.4 KEY PRIMARY INSIGHTS

7 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY DESIGN

7.1 INTRODUCTION

FIGURE 37 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY DESIGN, 2024 VS. 2030 (UNITS)

TABLE 37 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY DESIGN, 2019–2023 (UNITS)

TABLE 38 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY DESIGN, 2024–2030 (UNITS)

7.2 RADIAL FLUX

7.2.1 HIGH POWER DENSITY AND EFFICIENCY TO DRIVE GROWTH

TABLE 39 RADIAL FLUX: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 40 RADIAL FLUX: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

7.3 AXIAL FLUX

7.3.1 COMPACT DESIGN AND SCALABILITY TO DRIVE GROWTH

TABLE 41 AXIAL FLUX: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 42 AXIAL FLUX: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

7.4 KEY PRIMARY INSIGHTS

8 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY MOTOR TYPE

8.1 INTRODUCTION

FIGURE 38 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY MOTOR TYPE, 2024 VS. 2030 (UNITS)

TABLE 43 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY MOTOR TYPE, 2019–2023 (UNITS)

TABLE 44 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY MOTOR TYPE, 2024–2030 (UNITS)

8.2 PERMANENT MAGNET SYNCHRONOUS MOTOR

8.2.1 ADVANCEMENTS IN MOTOR DESIGN TO DRIVE GROWTH

TABLE 45 PERMANENT MAGNET SYNCHRONOUS MOTOR: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 46 PERMANENT MAGNET SYNCHRONOUS MOTOR: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

8.3 AC INDUCTION MOTOR

8.3.1 LOWER PRODUCTION COSTS TO DRIVE GROWTH

TABLE 47 AC INDUCTION MOTOR: ELECTRIC COMMERCIAL VEHICLE TRACTION

MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 48 AC INDUCTION MOTOR: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

8.4 DC TRACTION MOTOR

8.4.1 LOW EFFICIENCY AND HIGH ENERGY CONSUMPTION TO IMPEDE GROWTH

TABLE 49 DC TRACTION MOTOR: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 50 DC TRACTION MOTOR: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 51 DC SERIES MOTOR VS. DC BRUSHLESS MOTOR VS. SWITCHED RELUCTANCE MOTOR VS. ELECTRONICALLY EXCITED SYNCHRONOUS MOTOR

8.4.2 DC SERIES MOTOR

8.4.3 DC BRUSHLESS MOTOR

TABLE 52 BRUSHED AND BRUSHLESS MOTORS: ADVANTAGES AND DISADVANTAGES

8.4.4 SWITCHED RELUCTANCE MOTOR

8.4.5 ELECTRICALLY EXCITED SYNCHRONOUS MOTOR

8.5 KEY PRIMARY INSIGHTS

9 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY POWER OUTPUT

9.1 INTRODUCTION

FIGURE 39 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY POWER OUTPUT, 2024 VS. 2030 (UNITS)

TABLE 53 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY POWER OUTPUT, 2019–2023 (UNITS)

TABLE 54 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY POWER OUTPUT, 2024–2030 (UNITS)

9.2 LESS THAN 100 KW

9.2.1 RISING ADOPTION OF ELECTRIC VANS FOR DELIVERIES BY LOGISTICS SECTOR TO DRIVE GROWTH

TABLE 55 LESS THAN 100 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 56 LESS THAN 100 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

9.3 100–200 KW

9.3.1 COMPREHENSIVE OFFERINGS BY MOTOR MANUFACTURERS TO DRIVE

GROWTH

TABLE 57 100–200 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 58 100–200 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

9.4 200–400 KW

9.4.1 WIDE SCOPE OF APPLICATIONS IN ELECTRIC COMMERCIAL VEHICLES TO DRIVE GROWTH

TABLE 59 200–400 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 60 200–400 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

9.5 ABOVE 400 KW

9.5.1 ESCALATING DEMAND FOR HIGH-POWERED ELECTRIC PICK-UP TRUCKS TO DRIVE GROWTH

TABLE 61 ABOVE 400 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 62 ABOVE 400 KW: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

9.6 KEY PRIMARY INSIGHTS

10 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY TRANSMISSION

10.1 INTRODUCTION

FIGURE 40 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY TRANSMISSION, 2024 VS. 2030 (UNITS)

TABLE 63 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY TRANSMISSION, 2019–2023 (UNITS)

TABLE 64 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY TRANSMISSION, 2024–2030 (UNITS)

10.2 SINGLE-SPEED DRIVE

10.2.1 REDUCED MECHANICAL COMPLEXITY AND POWER LOSS TO DRIVE GROWTH

TABLE 65 SINGLE-SPEED DRIVE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 66 SINGLE-SPEED DRIVE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

10.3 MULTI-SPEED DRIVE

10.3.1 IMPROVED ACCELERATION AND RANGE TO DRIVE GROWTH

TABLE 67 MULTI-SPEED DRIVE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 68 MULTI-SPEED DRIVE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

10.4 KEY PRIMARY INSIGHTS

11 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE

11.1 INTRODUCTION

FIGURE 41 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024 VS. 2030 (USD MILLION)

TABLE 69 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 70 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 71 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 72 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

11.2 PICK-UP TRUCKS

11.2.1 RISING DEMAND FOR CLEANER TRANSPORTATION SOLUTIONS TO DRIVE GROWTH

TABLE 73 PICK-UP TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 74 PICK-UP TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 75 PICK-UP TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 76 PICK-UP TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.3 TRUCKS

11.3.1 RAPID DEVELOPMENT OF ELECTRIC TRUCKS BY AUTOMOTIVE OEMS TO DRIVE GROWTH

TABLE 77 TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 78 TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 79 TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 80 TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.3.1.1 Medium-duty trucks

TABLE 81 MEDIUM-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 82 MEDIUM-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 83 MEDIUM-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 84 MEDIUM-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.3.1.2 Heavy-duty trucks

TABLE 85 HEAVY-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 86 HEAVY-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 87 HEAVY-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 88 HEAVY-DUTY TRUCKS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.4 VANS

11.4.1 BOOMING LOGISTICS SECTOR TO DRIVE GROWTH

TABLE 89 VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 90 VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 91 VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 92 VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.4.1.1 Light vans

TABLE 93 LIGHT VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 94 LIGHT VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 95 LIGHT VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 96 LIGHT VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.4.1.2 Full-size vans

TABLE 97 FULL-SIZE VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 98 FULL-SIZE VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 99 FULL-SIZE VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 100 FULL-SIZE VANS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.5 BUSES & COACHES

11.5.1 INCREASING DEMAND FOR EMISSION-FREE PUBLIC TRANSPORT TO DRIVE GROWTH

TABLE 101 BUSES & COACHES: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 102 BUSES & COACHES: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 103 BUSES & COACHES: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 104 BUSES & COACHES: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

11.6 KEY PRIMARY INSIGHTS

12 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION

12.1 INTRODUCTION

FIGURE 42 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024 VS. 2030 (USD MILLION)

TABLE 105 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (UNITS)

TABLE 106 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (UNITS)

TABLE 107 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2019–2023 (USD MILLION)

TABLE 108 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY REGION, 2024–2030 (USD MILLION)

12.2 ASIA PACIFIC

12.2.1 RECESSION IMPACT

FIGURE 43 ASIA PACIFIC: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET SNAPSHOT**TABLE 109 ASIA PACIFIC: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2019–2023 (UNITS)****TABLE 110 ASIA PACIFIC: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024–2030 (UNITS)****TABLE 111 ASIA PACIFIC: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2019–2023 (USD MILLION)****TABLE 112 ASIA PACIFIC: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024–2030 (USD MILLION)****12.2.2 CHINA****12.2.2.1 Presence of leading players to drive market****TABLE 113 CHINA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)****TABLE 114 CHINA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)****TABLE 115 CHINA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)****TABLE 116 CHINA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)****12.2.3 JAPAN****12.2.3.1 Increased investments in automotive R&D to drive market****TABLE 117 JAPAN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)****TABLE 118 JAPAN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)****TABLE 119 JAPAN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)****TABLE 120 JAPAN ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)****12.2.4 INDIA****12.2.4.1 Major government initiatives to promote EV ecosystem to drive market****TABLE 121 INDIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)****TABLE 122 INDIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)****TABLE 123 INDIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)****TABLE 124 INDIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR**

MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)**12.2.5 SOUTH KOREA**

12.2.5.1 Rising demand for electric pick-up trucks to drive market

TABLE 125 SOUTH KOREA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 126 SOUTH KOREA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 127 SOUTH KOREA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 128 SOUTH KOREA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.3 NORTH AMERICA**12.3.1 RECESSION IMPACT**

FIGURE 44 NORTH AMERICA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET SNAPSHOT

TABLE 129 NORTH AMERICA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2019–2023 (UNITS)

TABLE 130 NORTH AMERICA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024–2030 (UNITS)

TABLE 131 NORTH AMERICA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 132 NORTH AMERICA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024–2030 (USD MILLION)

12.3.2 US

12.3.2.1 Rising adoption of electric vans with traction motors to drive market

TABLE 133 US: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 134 US: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 135 US: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 136 US: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.3.3 CANADA

12.3.3.1 Government plans to electrify transit to drive market

TABLE 137 CANADA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 138 CANADA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 139 CANADA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 140 CANADA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4 EUROPE

12.4.1 RECESSION IMPACT

FIGURE 45 EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024 VS. 2030 (USD MILLION)

TABLE 141 EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2019–2023 (UNITS)

TABLE 142 EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024–2030 (UNITS)

TABLE 143 EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2019–2023 (USD MILLION)

TABLE 144 EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY COUNTRY, 2024–2030 (USD MILLION)

12.4.2 FRANCE

12.4.2.1 Rising adoption of EVs to drive market

TABLE 145 FRANCE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 146 FRANCE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 147 FRANCE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 148 FRANCE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.3 GERMANY

12.4.3.1 Increasing investment in R&D activities for development of advanced ECV traction motors to drive market

TABLE 149 GERMANY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 150 GERMANY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 151 GERMANY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 152 GERMANY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.4 SPAIN

12.4.4.1 Government focus on replacing existing ICE buses and vans with EVs to

drive market

TABLE 153 SPAIN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 154 SPAIN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 155 SPAIN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 156 SPAIN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.5 AUSTRIA

12.4.5.1 Government support in electrification of commercial vehicles to drive market

TABLE 157 AUSTRIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 158 AUSTRIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 159 AUSTRIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 160 AUSTRIA: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.6 NORWAY

12.4.6.1 Rapid adoption of EVs to drive market

TABLE 161 NORWAY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 162 NORWAY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 163 NORWAY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 164 NORWAY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.7 SWEDEN

12.4.7.1 Growth of EV ecosystem to drive market

TABLE 165 SWEDEN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 166 SWEDEN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 167 SWEDEN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 168 SWEDEN: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.8 NETHERLANDS

12.4.8.1 Advancement in EV charging infrastructure to drive market

TABLE 169 NETHERLANDS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 170 NETHERLANDS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 171 NETHERLANDS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 172 NETHERLANDS: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.9 UK

12.4.9.1 Increasing investment in R&D activities for development of advanced electric traction motors to drive market

TABLE 173 UK: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 174 UK: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 175 UK: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 176 UK: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.10 ITALY

12.4.10.1 Strong focus on utilization of renewable energy sources to drive market

TABLE 177 ITALY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 178 ITALY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 179 ITALY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 180 ITALY: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

12.4.11 REST OF EUROPE

TABLE 181 REST OF EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (UNITS)

TABLE 182 REST OF EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (UNITS)

TABLE 183 REST OF EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET, BY VEHICLE TYPE, 2019–2023 (USD MILLION)

TABLE 184 REST OF EUROPE: ELECTRIC COMMERCIAL VEHICLE TRACTION

MOTOR MARKET, BY VEHICLE TYPE, 2024–2030 (USD MILLION)

13 COMPETITIVE LANDSCAPE

13.1 OVERVIEW

13.2 MARKET RANKING ANALYSIS

FIGURE 46 RANKING OF KEY ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET PLAYERS

13.3 REVENUE ANALYSIS

FIGURE 47 REVENUE ANALYSIS OF KEY PLAYERS, 2018–2022

13.4 COMPANY EVALUATION MATRIX

13.4.1 STARS

13.4.2 EMERGING LEADERS

13.4.3 PERVASIVE PLAYERS

13.4.4 PARTICIPANTS

FIGURE 48 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: COMPANY EVALUATION MATRIX, 2023

13.4.5 COMPANY FOOTPRINT

FIGURE 49 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: COMPANY FOOTPRINT

TABLE 185 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: REGION FOOTPRINT

TABLE 186 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: VEHICLE TYPE FOOTPRINT

13.5 STARTUP/SME EVALUATION MATRIX

13.5.1 PROGRESSIVE COMPANIES

13.5.2 RESPONSIVE COMPANIES

13.5.3 DYNAMIC COMPANIES

13.5.4 STARTING BLOCKS

FIGURE 50 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: STARTUP/SME EVALUATION MATRIX, 2023

13.5.5 COMPETITIVE BENCHMARKING

TABLE 187 LIST OF KEY STARTUPS/SMES

TABLE 188 COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES

13.6 COMPETITIVE SCENARIOS AND TRENDS

13.6.1 PRODUCT LAUNCHES

TABLE 189 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET: PRODUCT LAUNCHES, SEPTEMBER 2021–JANUARY 2024

13.6.2 DEALS

TABLE 190 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET:
DEALS, MARCH 2021–JANUARY 2024

13.6.3 EXPANSIONS

TABLE 191 ELECTRIC COMMERCIAL VEHICLE TRACTION MOTOR MARKET:
EXPANSIONS, APRIL 2022–SEPTEMBER 2023

13.7 COMPANY VALUATION AND FINANCIAL METRICS

13.7.1 COMPANY VALUATION

FIGURE 51 COMPANY VALUATION, 2023 (USD BILLION)

13.7.2 FINANCIAL METRICS

FIGURE 52 FINANCIAL METRICS OF KEY PLAYERS, 2024

13.8 PRODUCT COMPARISON

TABLE 192 ELECTRIC MOTOR COMPARISON

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