

Hybrid Vehicle Market by Electric Powertrain (Parallel, Series), Degree of Hybridization (Full, Micro, and Mild), Propulsion (HEV, PHEV, and NGV), Vehicle Type (PC, CV), Component (Battery, Electric Motor, and Transmission), and Region - Global Forecast to 2025

<https://marketpublishers.com/r/H26C13D6729EN.html>

Date: May 2018

Pages: 155

Price: US\$ 5,650.00 (Single User License)

ID: H26C13D6729EN

Abstracts

“Government initiatives supporting the development of HEVs and PHEVs are likely to propel the hybrid vehicle market”

The hybrid vehicle market is estimated to be 4,169 thousand units in 2018 and is projected to grow at a CAGR of 8.94% during the forecast period (2018–2025), to reach a market size of 7,593 thousand units by 2025. To reduce greenhouse gas emissions, governments in various countries are taking initiatives to create clean energy sources. Governments are increasingly investing in alternative sources of energy, such as HEVs, PHEV, NGVs, BEVs, and fuel cells. Hybrid vehicles are more fuel efficient than gasoline and diesel vehicles due to which the government is providing tax rebates and purchase grants to promote HEVs and PHEVs. Governments in various countries are also promoting NGVs as they have better fuel efficiency compared to fossil fuel-powered vehicles. Along with rebates and purchase grants, governments are supporting the electric infrastructure which is likely to increase the demand for PHEVs in the coming years. The increasing demand for Battery Electric Vehicles (BEVs) and Fuel Cell Electric Vehicles (FCEVs) is likely to be a major restraint for the growth of hybrid vehicles.

“The PHEV is estimated to be the fastest growing segment of the hybrid vehicle market, by propulsion, in terms of volume”

The trend in hybrid vehicles is growing toward PHEVs and Natural Gas Vehicles

(NGVs). It is seen that the demand for hybrid vehicles is either falling or growing slowly. This is possibly due to the continuous decrease in the battery price as developed nations are focusing more toward zero-emission vehicles to cope with stringent emission standards. However, the sale of PHEVs and NGVs is rising due to the availability of these cars in mid- and large-sized segment. PHEVs and NGVs have better fuel efficiency compared to HEVs. PHEVs in larger vehicles are popular due to the increased complexity and cost in the development of dual powertrain systems on a smaller car. Norway and Sweden are focusing on consumer preferences for large PHEVs rather than making small electric vehicles which have boosted the sales of PHEVs over the years.

“The commercial vehicle segment is the fastest growing segment of hybrid vehicle market”

Though the passenger car market is estimated to be the largest in the hybrid vehicle market, commercial vehicle market is estimated to be the fastest growing market. The developments in terms of reducing emissions are also being seen in the commercial vehicle segment. OEMs such as Volvo, Scania, Daimler, and others are focusing on developing hybrid commercial vehicles to cope with the stringent emission norms. Also, a significant rise in freight sector has boosted the demand for commercial long haulage trucks. OEMs are developing hybrid trucks with benefits such as low emission and high fuel efficiency. This would enable high growth in the freight sector which relatively will increase the demand for hybrid commercial vehicles.

“Asia Pacific is estimated to be the fastest growing regional market for hybrid vehicles”

Asia Pacific is estimated to be the fastest growing market for hybrid vehicles, with Japan accounting for the largest market share in 2018. The market growth in the region can be attributed to the increased focus on the development of hybrid vehicle technology. The Asia Pacific region is home to major hybrid vehicle manufacturers, such as Toyota, Honda, Nissan, Kia, BYD, and Hyundai. Also, the government in the region is supporting the development of PHEVs and NGVs by providing purchase grants and tax rebates. The support from government and increasing sales are likely to boost the hybrid vehicle market in the region.

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

By Company Type: Tier-1–43%, Tier-2–36%, and Tier 3–21%

By Designation: C—level Executives –57%, Directors–29%, Others–14%

By Region: North America–29%, Europe–38%, Asia Pacific–26%, RoW–7%

The report provides detailed profiles of the following companies

Toyota (Japan)

Ford (US)

Daimler (Germany)

Volvo (Sweden)

Hyundai (South Korea)

Honda (Japan)

Continental (Germany)

ZF (Germany)

Allison Transmission (US)

BorgWarner (Germany)

Schaeffler (Germany)

Bosch (Germany)

Mitsubishi (Japan)

GM (US)

Magna (Canada)

Research Coverage

The hybrid vehicle market has been segmented by electric powertrain type (parallel and series), component (battery, electric motor and transmission), propulsion (HEV, PHEV, and NGV), degree of hybridization (full hybrid, micro hybrid and mild hybrid), vehicle type (passenger car and commercial vehicle), and region (Asia Pacific, Europe, North America, and Rest of the World). The market has been projected in terms of volume (units).

Reasons to Buy the Report:

The report provides insights into the following points:

Market Penetration: The report provides comprehensive information on hybrid vehicle market and the top players in the industry.

Regulatory Framework: The report offers detailed insights into norms leading to the hybrid vehicles and the effect of the regulations on the market.

Market Development: The report provides comprehensive information on various technologies of hybrid vehicles. The report analyzes the markets for various hybrid vehicle technologies across different countries.

Market Diversification: The report provides exhaustive information about emerging technologies, recent developments, and investments in the global hybrid vehicle market.

Competitive Assessment: The report offers an in-depth assessment of strategies, services, and manufacturing capabilities of leading players in the global hybrid vehicle market.

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