

Vehicle Electrification Market by Product (Start-Stop, PTC, EPS, Electric Air Conditioner, ISG, Starter Motor, Alternator, Actuator, Electric Pump-Vacuum, Oil & Water), 48V, ICE, BEV, HEV, PHEV, Vehicle Type, and Region - Global Forecast to 2025

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Abstracts

“Demand for increased fuel economy, low maintenance cost, and improved performance are boosting the trend of vehicle electrification”

The vehicle electrification market is projected to grow at a CAGR of 11.9% to reach USD 129.6 billion by 2025 from USD 73.7 billion. OEMs are switching from conventional technology to advanced technology for complying with the norms and increasing vehicle efficiency. There are multiple engine, transmission, and hybrid technologies that can help in improving the fuel efficiency of a vehicle. For instance, according to the US Department of Energy (US DOE), the start-stop system can improve fuel efficiency by up to 5%, based on driving and traffic conditions. Also, components such as electric oil pump and electric vacuum pump consume lesser energy than their conventional counterparts. However, higher cost of electric vehicles can undermine the demand for vehicle electrification.

“The market for BEVs is estimated to witness the fastest growth in the vehicle electrification market”

BEVs are projected to lead the vehicle electrification market, in terms of value, during the next 10 years. Automakers are seeing BEVs as a gateway to achieving fuel emission and economy standards set by governments. Government tax incentives and state rebates have boosted the proliferation of BEVs. Asia Oceania and North America are the fastest growing regions for BEVs. Increasing charging infrastructure in North

America would be responsible for the shift from conventional ICE vehicles to BEVs. OEMs of this region have also invested significantly in vehicle electrification. This would also drive the demand for BEVs.

“The electric power steering (EPS) is estimated to be the largest segment of the vehicle electrification market”

Electric Power Steering (EPS) systems are power-assisted steering products that eliminate the association between the steering system and the engine. EPS is the most popular steering system in the global market as it reduces fuel consumption and emissions, limits the required servicing, and improves maneuverability. In Europe and North America, almost all vehicles have EPS, and in Asia Oceania, the trend is growing rapidly. Hence, the EPS segment is estimated to hold the largest market share during the forecast period.

“Asia Oceania: the largest vehicle electrification market in the automotive industry”

Asia Oceania is the leading vehicle electrification market as the region represents countries such as China, Japan, South Korea, and India, with the world’s highest vehicle production. The automobile industry is flourishing, especially in South Asia. Additionally, Asia Oceania has created hubs for automobile manufacturers and automotive component suppliers. Considering the vehicle electrification market in the Asia Oceania region in 2019, the passenger car segment is estimated to lead the market, comprising more than 80% of the vehicle electrification market in the region, followed by the LCV segment, in terms of both volume and value. As Asia Oceania has the largest share of passenger cars, ICE vehicles are expected to dominate the vehicle electrification market in Asia Oceania. Countries such as China and India have plans to upgrade their emission regulations by 2020. For instance, India is planning to skip BS V regulations by leapfrogging to BS VI. This is a positive development for the vehicle electrification market. Additionally, the demand for more electric and electronic components in vehicles helps drive vehicle electrification.

BREAKDOWN OF PRIMARIES

The study contains insights provided by various industry experts, ranging from vehicle electrification OEMs to vehicle electrification component suppliers. The break-up of the primaries is as follows:

By Company Type – Tier-I - 25%, Tier-II - 20% OEMs – 40%, and Others- 15%

By Designation – C level - 40%, D level - 35%, and Others** - 25%

By Region – North America - 35%, Europe - 35%, Asia Oceania - 25%, RoW-5%

Note: Others** include sales managers, product managers, and associations.

Tier 1 - System suppliers to OEMs, Tier 2 - component suppliers to Tier 1. OEMs are Vehicle Manufacturers Others are Industry experts and Independent consultants

The vehicle electrification market comprises major manufacturers such as Bosch (Germany), Continental (Germany), Denso (Japan), BorgWarner (US), and Mitsubishi Electric (Japan).

The report provides detailed profiles of the following companies:

Bosch (Germany)

Continental (Germany)

Denso (Japan)

Delphi (UK)

Johnson Electric (Hong Kong)

Mitsubishi Electric (Japan)

BorgWarner (US)

Magna (Canada)

Aisin Seiki (Japan)

Johnson Controls (US)

ZF Friedrichshafen (Germany)

Valeo (France)

JTEKT Corp. (Japan)

Hitachi Automotive Systems (Japan)

Wabco Holding Inc (Belgium)

Research Coverage:

The report provides a picture of the vehicle electrification market across different verticals and regions. It aims at estimating the market size and future growth potential of the vehicle electrification market, by product type, by degree of hybridization, 48V, by vehicle type, and by region. Furthermore, the report also includes an in-depth competitive analysis of the key players in the market along with their company profiles, Vendor DIVE matrix, recent developments, and key market strategies.

Key Benefits of Buying the Report:

This report provides insights with reference to the following points:

The report will help market leaders and new entrants in by providing them the closest approximations of the revenue numbers for the overall vehicle electrification market and subsegments.

This report will help stakeholders better understand the competitor landscape and gain more insights to position their businesses better and make suitable go-to-market strategies.

The report also helps stakeholders understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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