

Automotive Energy Recovery System Market Forecasts to 2034 – Global Analysis By Type (Automotive Regenerative Braking System, Automotive Waste Heat Recovery System, Exhaust Gas Recirculation System and Other Types), By Component (Batteries, Visual Indicators, Sensors and Other Components), Vehicle and By Geography

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Abstracts

According to Statistics MRC, the Global Automotive Energy Recovery System Market is accounted for \$38.3 billion in 2024 and is expected to reach \$78.7 billion by 2034 growing at a CAGR of 9.4% during the forecast period. Automotive Energy Recovery Systems capture and store energy typically lost during braking or deceleration in vehicles. This harvested energy is often converted into electrical power, stored in batteries or capacitors and later reused to enhance fuel efficiency or provide additional propulsion, reducing overall energy waste and enhancing a vehicle's performance.

According to the latest data by the industry body, Society of Indian Automobile Manufacturers (SIAM), the second quarter of FY24 witnessed an 1.04% growth in total domestic sales to 61,16,091 units compared to 60,52,739 units in the same period in FY23.

Market Dynamics:

Driver:

Rising carbon emissions and fuel scarcity

The escalating concerns over rising carbon emissions and the looming scarcity of traditional fuels serve as potent drivers in the automotive energy recovery system market. With stringent emissions regulations worldwide and the urgent need to curb environmental impact, ERS technology offers a promising solution. By harnessing and reusing energy otherwise dissipated during braking or deceleration, these systems enhance fuel efficiency and reduce emissions in vehicles. Moreover, as global fuel resources become scarcer, the imperative to optimize energy usage through ERS becomes even more crucial, driving its adoption in the automotive industry.

Restraint:

Infrastructure limitations

Energy recovery systems often rely on specialized infrastructure for charging or energy storage, which might not be universally available. Inadequate charging stations or infrastructure for energy storage can deter consumer adoption, limiting the feasibility and convenience of ERS-equipped vehicles. Moreover, the establishment of a robust infrastructure demands significant investment and coordination among stakeholders, creating challenges for widespread implementation, especially in regions lacking supportive networks for ERS-equipped vehicles. These limitations can slow down market growth.

Opportunity:

Technological advancements

Ongoing innovation allows for the development of more efficient, compact and cost-effective energy recovery system solutions. Advancements in materials, such as high-performance capacitors or improved energy storage systems, enhance the overall effectiveness of energy recovery. Moreover, innovations in control algorithms, regenerative braking systems, and integration with other vehicle systems pave the way for more seamless and optimized ERS implementation. These advancements attract consumer interest, drive market growth, and enable automakers to offer more sustainable and efficient vehicle options, fostering industry competitiveness.

Threat:

Competition from alternative technologies

Emerging advancements in alternate propulsion systems like hydrogen fuel cells, advancements in battery technology for electric vehicles and other efficiency-boosting technologies pose a competitive threat. These alternatives present diverse solutions for reducing emissions and enhancing vehicle efficiency, potentially diverting investment and focus away from energy recovery systems.

Covid-19 Impact:

The COVID-19 pandemic disrupted the Automotive Energy Recovery System market by causing supply chain disruptions, factory shutdowns and a decline in vehicle production. Reduced consumer demand and financial uncertainty also slowed investment in new automotive technologies. These factors collectively impacted the industry's growth trajectory, delaying the adoption and implementation of energy recovery systems in vehicles.

The automotive regenerative braking system segment is expected to be the largest during the forecast period

The automotive regenerative braking system is anticipated to lead due to its widespread integration across various vehicle types, especially hybrid and electric models. Regenerative braking offers significant energy recovery by converting kinetic energy into electrical energy during deceleration, enhancing fuel efficiency and range in electric vehicles. Additionally, regulatory pressures for improved fuel economy and reduced emissions globally drive the prominence of regenerative braking systems, positioning them as the dominant segment in the automotive energy recovery market.

The electric vehicles segment is expected to have the highest CAGR during the forecast period

The electric vehicles segment is poised for the highest growth rate due to increasing environmental concerns, stringent emissions regulations and a global shift towards sustainable transportation. As EV adoption rises, the demand for energy-efficient systems like automotive energy recovery systems will extend range and improve overall efficiency. With continual advancements in EV technology, coupled with government incentives and expanding charging infrastructure, the market outlook for ERS within the electric vehicle sector shows substantial growth potential, driving its high projected CAGR.

Region with largest share:

North America is set to dominate the market due to the region's robust automotive industry, technological advancements, supportive government initiatives promoting sustainable transportation and a growing focus on reducing vehicle emissions. Additionally, increased consumer awareness and the presence of key market players investing in energy-efficient solutions further contribute to North America's prominence in driving the adoption and development of automotive energy recovery systems.

Region with highest CAGR:

The Asia Pacific region is poised for substantial growth in the market owing to the burgeoning automotive industry, rising demand for electric vehicles, government initiatives promoting clean energy and sustainable transportation and increasing environmental concerns. Additionally, investments in technological innovation, supportive policies and collaborations between manufacturers and technology providers drive the region's potential for robust expansion in adopting and implementing automotive energy recovery systems.

Key players in the market

Some of the key players in Automotive Energy Recovery System Market include AVL, BorgWarner Inc., BYD Auto Co., Ltd., Contemporary Amperex Technology Co., Limited (CATL), Continental AG, Delphi Technologies Plc, Denso Corporation, Eaton Corporation, Hino Motors, Ltd., Honeywell International Inc., Infineon Technologies AG, Lucid Motors, Magna International Inc., NXP Semiconductors, REE Automotive, Rheinmetall AG, Robert Bosch GmbH, Tesla, Inc., Valeo SA and ZF Friedrichshafen AG.

Key Developments:

In December 2022, Rheinmetall acquired a contract worth around EUR 300 million. Under this contract, the company will provide exhaust gas recirculation modules to a Pierburg Group subsidiary. The order includes low- and high-pressure EGR modules. The systems contain an aluminum housing and a bypass with a fully integrated water-cooling circuit. The company will begin production in August 2026.

In January 2022, BYD introduced the Type A electric school bus, a battery-electric vehicle. The energy recovery systems help optimize energy usage by capturing and reusing energy during braking & deceleration, ultimately enhancing the efficiency and

range of electric vehicles.

Types Covered:

Automotive Regenerative Braking System

Automotive Waste Heat Recovery System

Kinetic Energy Recovery System

Flywheel Energy Recovery System

Exhaust Gas Recirculation System

Other Types

Components Covered:

Batteries

Actuators

Sensors

Electric Motors

Controllers

Visual Indicators

Other Components

Vehicles Covered:

Passenger Vehicles

Commercial Vehicles

Electric Vehicles

Hybrid Vehicles

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations

- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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