

# **Automotive Battery Powered Propulsion System Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Battery Type (Lithium-Ion, Nickel Metal Hydride, Others), By Application Type (Plug-in Vehicle, Hybrid Electric Vehicle, On and Off-Road Electric Vehicle), By Region, Competition 2018-2028**

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## **Abstracts**

Global Automotive Battery Powered Propulsion System market was valued at USD 16 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.71% through 2028. The automotive battery-powered propulsion system market is a pivotal segment within the automotive industry, driving the shift towards electrification and sustainable mobility. The automotive battery-powered propulsion system market is driven by several factors, including regulatory mandates, consumer demand for electric vehicles, and advancements in battery technology. Stringent emissions regulations and fuel economy standards drive automakers to invest in electrified powertrains to meet regulatory compliance and market demand for cleaner, more efficient vehicles. Consumer preferences for electric vehicles are influenced by factors such as environmental awareness, energy independence, and technological innovation, leading to increased adoption of battery-powered propulsion systems in mainstream automotive markets. Technological advancements in battery chemistry, manufacturing processes, and energy management systems enable automakers to improve battery performance, durability, and cost-effectiveness, driving down the total cost of ownership and accelerating the transition towards electric mobility.

Challenges facing the automotive battery-powered propulsion system market include battery cost, range anxiety, and infrastructure limitations. While battery costs have

declined significantly in recent years, they remain a significant barrier to widespread electric vehicle adoption, particularly in price-sensitive market segments. Range anxiety, or the fear of running out of battery charge while driving, persists as a concern among consumers, highlighting the need for continued investment in battery technology and charging infrastructure. Infrastructure limitations, including inadequate charging infrastructure and grid capacity constraints, pose challenges for electric vehicle deployment in certain regions, requiring collaborative efforts between governments, utilities, and private stakeholders to address.

Opportunities for market growth lie in the development of advanced battery technologies, charging infrastructure, and vehicle-to-grid (V2G) integration solutions that enhance the performance, convenience, and sustainability of electric vehicles. Collaborative initiatives between automakers, battery manufacturers, and energy providers facilitate technology innovation, standardization, and scale economies that drive down costs and accelerate the adoption of electric mobility. Moreover, the electrification of on and off-road vehicle fleets presents opportunities for manufacturers, fleet operators, and governments to reduce emissions, improve air quality, and enhance energy security through sustainable transportation solutions. Overall, the automotive battery-powered propulsion system market is poised for rapid growth and innovation as the automotive industry transitions towards electrification and sustainable mobility.

## Market Drivers

### Environmental Concerns and Regulatory Pressures

One of the primary market drivers for battery-powered propulsion systems in the automotive industry is the growing concern over environmental issues, particularly related to climate change and air quality. The combustion of fossil fuels in traditional internal combustion engines (ICE) vehicles is a major contributor to greenhouse gas emissions and air pollution. As a result, governments worldwide are implementing stringent emissions regulations and incentives to promote cleaner transportation options. For example, many countries have established emission reduction targets, and some have even announced plans to ban the sale of new gasoline and diesel-powered vehicles in the near future. In response to these regulatory pressures, automakers are increasingly investing in battery-powered propulsion technology to reduce their carbon footprint. Electric vehicles produce zero tailpipe emissions, making them an environmentally friendly option. This has led to a surge in the production and adoption of battery-powered vehicles and their supporting infrastructure.

## Advancements in Battery Technology

The advancement of battery technology is a pivotal driver in the growth of the automotive battery-powered propulsion system market. Over the years, there have been significant improvements in battery energy density, durability, and cost-effectiveness. Lithium-ion batteries, in particular, have become the standard choice for EVs due to their high energy storage capacity and long-life cycles. Additionally, research and development efforts are ongoing to further enhance battery performance, reduce charging times, and lower costs. Improvements in battery technology have addressed some of the key limitations of electric vehicles, such as limited range and longer charging times. These advancements have contributed to the increased acceptance of EVs by consumers, as they can now experience a driving range comparable to that of traditional gasoline-powered vehicles.

## Consumer Demand for Sustainable Transportation

The growing awareness of environmental issues has led to increased consumer demand for sustainable transportation solutions. Consumers are increasingly looking for vehicles that align with their values and contribute to reducing their carbon footprint. Battery-powered vehicles are seen as a more sustainable and eco-friendlier alternative to traditional gasoline and diesel-powered vehicles. This demand for sustainable transportation is driven by a desire to reduce air pollution, dependence on fossil fuels, and the overall environmental impact of personal transportation. Additionally, the appeal of reduced operating costs and government incentives, such as tax credits and rebates, has further fueled consumer interest in electric vehicles. As a result, automakers are striving to meet this demand by offering a broader range of battery-powered vehicles with varying price points, styles, and features to cater to a diverse consumer base.

## Cost Reduction and Economies of Scale

The cost of battery-powered propulsion systems has historically been a significant barrier to their widespread adoption. However, as the market has matured and production volumes have increased, economies of scale have come into play. This has led to a substantial reduction in the cost of electric vehicle components, including batteries. Several factors contribute to this cost reduction. First, increased production volumes have allowed automakers to negotiate better prices for components and batteries from suppliers. Second, advancements in battery manufacturing processes, including automation and improved chemistry, have made production more efficient and cost-effective. Third, research and development investments have driven down the cost

per kilowatt-hour (kWh) of battery capacity, a critical metric for electric vehicle affordability. The declining cost of battery-powered propulsion systems is making electric vehicles more accessible to a broader range of consumers. This trend has encouraged automakers to expand their electric vehicle offerings and invest in technology that will further reduce costs, ultimately driving market growth.

## Technological Innovation and Infrastructure Development

Technological innovation and infrastructure development play a crucial role in the expansion of the automotive battery-powered propulsion system market. The continuous development of electric vehicle technology has led to improved features and capabilities, such as longer driving ranges, faster charging times, and enhanced connectivity. Innovations in autonomous driving and energy management systems have also become focal points of development. Moreover, infrastructure development is essential for the widespread adoption of electric vehicles. This includes the expansion of charging networks, which is critical for addressing the range anxiety concerns of potential EV buyers. Governments, private companies, and other stakeholders are investing in the construction of charging stations in urban areas, along highways, and in public spaces. Furthermore, there is a growing emphasis on the development of smart grids and renewable energy sources, which can facilitate the integration of electric vehicles into the energy ecosystem. The combination of technological innovation and infrastructure development is creating a more favorable environment for electric vehicles, removing some of the barriers that have hindered their market penetration. As these trends continue, they are expected to drive the adoption of battery-powered propulsion systems in the automotive industry.

## Key Market Challenges

### High Initial Cost

One of the most significant challenges for the adoption of battery-powered propulsion systems in the automotive market is the high initial cost of electric vehicles (EVs). EVs typically have a higher upfront purchase price compared to their internal combustion engine (ICE) counterparts. This cost disparity is primarily due to the expense of the battery pack, which is the most expensive component of an electric vehicle. While battery prices have been steadily decreasing, and economies of scale have been driving down costs, EVs still carry a premium that can deter budget-conscious consumers. This high initial cost can be a significant barrier to mass adoption, particularly in price-sensitive market segments. Addressing this challenge requires

automakers and governments to work on making EVs more affordable. This can be achieved through subsidies, tax incentives, and other financial incentives aimed at reducing the cost gap between EVs and traditional vehicles. Additionally, advancements in battery technology, more efficient production processes, and increased competition among automakers can contribute to lowering the upfront cost of electric vehicles.

### Limited Range and Charging Infrastructure

Range anxiety, or the fear of running out of battery power before reaching a destination, is another substantial challenge in the global automotive battery-powered propulsion system market. Despite improvements in battery technology, most electric vehicles still offer a limited driving range compared to ICE vehicles. This constraint is more noticeable in certain segments, such as electric cars, where drivers may need to plan their routes more carefully to ensure access to charging stations. The availability and accessibility of charging infrastructure also pose a significant hurdle. Charging stations are not as widespread as gasoline and diesel fueling stations, which means that EV owners may encounter challenges during long journeys or in areas with limited charging options. Moreover, charging times, though improving, are still longer than refueling a conventional vehicle with gasoline. To mitigate these issues, the industry is actively working on expanding the charging network, developing faster charging solutions, and enhancing battery technology to increase driving ranges. Collaboration between governments, private companies, and automakers is essential to make charging infrastructure more widespread and accessible, thereby addressing range anxiety.

### Battery Technology Limitations

Battery technology limitations are a fundamental challenge in the electric vehicle market. While there have been significant advancements in battery energy density, durability, and cost reduction, limitations remain. Despite progress, lithium-ion batteries and other existing technologies still have limitations in terms of energy density. This means that electric vehicles may need larger and heavier battery packs to achieve longer ranges, which can impact vehicle weight, cost, and handling characteristics. Fast charging is an essential requirement for widespread electric vehicle adoption, but rapid charging can lead to heat generation and reduced battery life. Battery technologies need to evolve to support faster charging without compromising safety and longevity. Lithium-ion batteries degrade over time, and this degradation can impact a vehicle's range and overall performance. While advancements have been made to extend battery life, further progress is needed to create longer-lasting and more reliable batteries. The production of lithium-ion batteries relies on the availability of critical materials, including



lithium and cobalt. Sourcing these materials sustainably and responsibly is a growing concern. Addressing these limitations will require ongoing research and development efforts to innovate and discover new battery technologies that offer higher energy density, faster charging, longer lifespan, and reduced reliance on scarce resources.

### Infrastructure Gaps and Charging Standards

The lack of standardized charging infrastructure and protocols is a challenge for the electric vehicle market. Different regions and countries often have their own standards for charging connectors, which can lead to compatibility issues for EV owners traveling between areas with different charging infrastructure. Standardization in charging connectors and protocols is crucial to ensure that EV owners have a seamless charging experience regardless of their location. The development of widely accepted standards, such as the CCS (Combined Charging System) and CHAdeMO, is a step in the right direction. However, ensuring that these standards are adopted universally and that existing charging stations are retrofitted with the necessary equipment remains a challenge. Moreover, interoperability issues can arise with different levels of charging (Level 1, Level 2, and DC fast charging) and the varying power outputs of charging stations. Streamlining the charging experience for electric vehicle owners and addressing these infrastructure gaps is essential for the continued growth of the market.

### Regulatory and Policy Challenges

Regulatory and policy challenges play a significant role in shaping the electric vehicle market. These challenges encompass a wide range of issues, including emissions regulations, incentives, and taxation policies: While many governments are implementing stricter emissions standards to encourage cleaner transportation, some regions have not yet established clear and consistent regulations. Inconsistent standards can create market uncertainty and slow down investments in electric vehicle technology. Government incentives, such as tax credits and rebates for electric vehicle buyers, have been instrumental in promoting adoption. However, the availability and level of these incentives can vary greatly by region and are subject to changes over time, making it challenging for consumers to predict their cost savings. Taxation policies can also impact the electric vehicle market. Some governments impose additional taxes or fees on EV owners, while others offer exemptions to encourage adoption. These policies need to be carefully balanced to ensure fair competition in the automotive market. Regulations regarding the installation and operation of charging infrastructure can also be a challenge, as they vary from one location to another. Streamlining these regulations can help facilitate the growth of charging networks. Addressing these

regulatory and policy challenges requires collaboration between governments, industry stakeholders, and environmental organizations to establish consistent, long-term policies that promote electric vehicle adoption and create a favorable business environment.

## Key Market Trends

### Diverse Product Offerings

One prominent market trend is the diversification of product offerings in the battery-powered propulsion system market. As electric vehicles (EVs) continue to gain popularity, automakers are broadening their product lines to cater to various customer segments and preferences. This trend is evident in the proliferation of electric cars, electric SUVs, electric trucks, and even electric performance vehicles. Automakers are focusing on creating EVs that offer a range of options in terms of size, style, and features. This diversification is driven by the recognition that consumers have different needs and preferences, and the one-size-fits-all approach does not apply to the EV market. As a result, consumers can now choose from affordable, entry-level EVs to high-end luxury electric vehicles, each tailored to meet specific requirements. Moreover, this trend extends to commercial vehicles, with electric options for delivery vans, buses, and even construction equipment. As cities and governments prioritize clean transportation, there is a growing market for electric commercial vehicles, and automakers are seizing this opportunity to offer a broad range of products.

### Extended Range and Faster Charging

A notable trend in the battery-powered propulsion system market is the continuous improvement in range and charging technology. Over the years, EVs have addressed one of the main concerns of potential buyers: range anxiety. Battery technology advancements have led to increased energy density and, consequently, greater driving ranges on a single charge. Furthermore, charging infrastructure has expanded, making it easier for EV owners to recharge their vehicles. Rapid charging stations, capable of significantly reducing charging times, have become more widespread. These developments are contributing to the mainstream adoption of EVs, as they offer a driving experience that is increasingly comparable to that of traditional internal combustion engine (ICE) vehicles. Automakers are investing in even faster-charging solutions and are working on battery technologies that promise shorter charging times. This trend is essential for addressing the practical concerns of consumers and facilitating long-distance travel with electric vehicles.

## Energy Efficiency and Sustainability

Energy efficiency and sustainability have become central themes in the battery-powered propulsion system market. As the world grapples with the urgent need to reduce carbon emissions and combat climate change, the automotive industry is aligning itself with sustainability goals. Automakers are focusing on improving the energy efficiency of their electric vehicles. This entails optimizing various components, such as motors, regenerative braking systems, and thermal management, to ensure that as much of the energy stored in the battery is effectively converted into vehicle propulsion. Improved energy efficiency not only extends the range of EVs but also reduces the overall environmental impact of driving. Sustainability also encompasses the materials and manufacturing processes used in battery production. Efforts are being made to source materials responsibly, reduce the environmental footprint of battery production, and increase the recyclability of batteries. As a result, automakers are striving to create a more sustainable lifecycle for EVs, from raw material extraction to end-of-life disposal.

## Connected and Autonomous Features

Another significant trend in the automotive battery-powered propulsion system market is the integration of connected and autonomous features in electric vehicles. As the automotive industry evolves, electric vehicles are becoming increasingly connected and intelligent. Connected features include advanced infotainment systems, over-the-air updates, and smartphone integration, all of which enhance the overall driving experience. These features allow for remote vehicle monitoring and control, which can be especially useful for EV owners. Moreover, connected technology enables efficient route planning and access to real-time data on charging station availability, further reducing range anxiety. Autonomous driving technology is another key aspect of this trend. While fully autonomous vehicles are still in development, many electric vehicles are equipped with advanced driver-assistance systems (ADAS). These systems offer features such as adaptive cruise control, lane-keeping assistance, and automated parking. As technology matures, it is expected to play a crucial role in making electric vehicles safer and more convenient.

## Global Expansion and Market Penetration

The battery-powered propulsion system market is witnessing a trend of global expansion and market penetration. Electric vehicles are no longer limited to a few select regions but are gaining acceptance worldwide. Governments and regulatory bodies are



increasingly incentivizing electric mobility by offering tax incentives, rebates, and emissions regulations that favor EVs. Automakers are recognizing the global potential of electric vehicles and are expanding their market reach. They are not only investing in research and development to create electric models but are also establishing manufacturing plants in various regions to cater to local demand. This global expansion is crucial for ensuring that EVs are accessible and affordable to consumers in different parts of the world. Moreover, the battery and charging infrastructure is growing internationally, with charging networks being developed on a global scale. As electric vehicles become more accessible and practical for consumers across different regions, market penetration is increasing, and the global automotive battery-powered propulsion system market is poised for significant growth.

### Segmental Insights

In terms of battery type, the market primarily revolves around three main categories: lithium-ion, nickel-metal hydride, and other types. Lithium-ion batteries dominate the market due to their superior energy density, longer lifespan, and faster charging capabilities compared to other battery chemistries. These batteries are widely used in electric vehicles (EVs), hybrid electric vehicles (HEVs), and plug-in hybrid electric vehicles (PHEVs) due to their ability to provide sufficient power and range to meet consumers' driving needs. Nickel-metal hydride batteries, while less common in newer vehicle models, are still utilized in some hybrid vehicles for their reliability and relatively lower cost. Other types of batteries, such as solid-state batteries and advanced lithium-ion variants, are also emerging as potential alternatives, offering improved performance and safety features.

The application of battery-powered propulsion systems spans various vehicle types and use cases, including plug-in vehicles, hybrid electric vehicles, and on and off-road electric vehicles. Plug-in vehicles, including battery electric vehicles (BEVs) and PHEVs, rely solely or primarily on electric propulsion, with the ability to charge their batteries from external power sources. These vehicles offer zero-emission driving and are increasingly favored by consumers and governments seeking to reduce greenhouse gas emissions and dependence on fossil fuels. Hybrid electric vehicles (HEVs) combine internal combustion engines with electric propulsion systems, offering improved fuel efficiency and reduced emissions compared to traditional gasoline vehicles. On and off-road electric vehicles encompass a wide range of applications, including electric buses, trucks, delivery vans, and off-road vehicles used in agriculture, mining, and construction. These vehicles leverage battery-powered propulsion systems to achieve lower operating costs, reduced environmental impact, and enhanced performance

compared to their conventional counterparts..

## Regional Insights

Asia Pacific will continue to dominate during the projection period. This is explained, among other places, by rising sales of passenger cars and electric vehicles in China, India, South Korea, and Japan. Furthermore, it is projected that demand in this region will be driven by expanding infrastructure development to accommodate increased vehicle production. Due to the strong demand from European nations like France and Germany, which have enacted strict laws prohibiting carbon emissions from automobile sources, battery-operated propulsion systems are preferred throughout this region. The market in North America is expanding as a result of the presence of significant players and an increase in research and development efforts pertaining to advanced automotive batteries, which are utilized to power motors because they have better performance characteristics than standard batteries.

## Key Market Players

Robert Bosch GmbH

JTEKT Corporation

Denso Corporation

Nexteer Automotive

Mitsubishi Electric Corporation

TRW Automotive Holding

A123 Systems

NEC Corp

E-One Moli Energy Corp.

GS Yuasa Corp.

## Report Scope:

In this report, the Global Automotive Battery Powered Propulsion System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Automotive Battery Powered Propulsion System Market, By Battery Type:

Lithium-Ion

Nickel Metal Hydride

Others

### Automotive Battery Powered Propulsion System Market, By Application Type:

Plug-in Vehicle

Hybrid Electric Vehicle

On and Off-Road Electric Vehicle

### Automotive Battery Powered Propulsion System Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Battery Powered Propulsion System Market.

## Available Customizations:

Global Automotive Battery Powered Propulsion System market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).



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