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Hybrid Vehicle Powertrain Component Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Vehicle Type (Passenger Car, Light Commercial Vehicle (LCV), Medium & Heavy Commercial Vehicle (M&HCV)), By Propulsion (HEV, PHEV), By Component (Battery, Motor, Controller, Engine, Transmission, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Hybrid Vehicle Powertrain Components Market is projected to expand significantly from USD 120.91 Billion in 2025 to USD 289.89 Billion by 2031, demonstrating a robust 15.69% Compound Annual Growth Rate. This market specifically covers critical specialized hardware, such as internal combustion engines, electric motors, high-voltage battery packs, transmissions, and power electronics, which are fundamental for dual-propulsion systems. This growth is predominantly driven by increasingly stringent international emission regulations and a clear consumer trend favoring fuel-efficient mobility options that serve as a transition between fossil fuel and fully electric vehicles. Reflecting this growing demand, conventional hybrid vehicle sales in the United States reached 2.05 million units in 2025, representing a 27.6% year-over-year increase, as reported by the National Automobile Dealers Association.

Market Driver

A key driver for the Global Hybrid Vehicle Powertrain Components Market is the strategic redirection of major automakers toward electrified vehicle portfolios. Acknowledging the substantial infrastructure challenges associated with full

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electrification, Original Equipment Manufacturers (OEMs) are proactively retooling their production facilities to prioritize hybrid architectures that demand intricate dual-propulsion hardware. This shift mandates the establishment of strong supply chains for crucial components like high-voltage batteries, specialized transmissions, and electric motors. Illustrating this industrial realignment, Toyota Motor Corporation announced in November 2025, through its 'Toyota Boosts Hybrid Production with $912 Million Investment' press release, a $912 million investment in its U.S. operations to expand the manufacturing capacity for hybrid transaxles and engines. These significant capital infusions directly foster the procurement and technological advancement of essential powertrain components, compelling suppliers to scale their operations to fulfill heightened production targets. Concurrently, the market benefits from increasing consumer demand for fuel-efficient mobility, particularly amidst fluctuating oil prices. Consumers are increasingly opting for hybrid models due to their lower operating costs and absence of range anxiety, which boosts high-volume orders for power electronics and coupling systems. This trend is substantiated by strong sales figures, such as Ford Motor Company's record sale of 55,177 hybrid vehicles in Q3 2025, reported in its 'Third Quarter 2025 Sales Report'. Furthermore, this surge in adoption extends beyond North America, with hybrid-electric models capturing 34.6% of the total European Union car market in 2025, according to the European Automobile Manufacturers' Association, highlighting their pivotal role in the ongoing automotive transition and the resulting demand for specialized components.

Market Challenge

A significant impediment to the growth of the Global Hybrid Vehicle Powertrain Components Market is the substantial cost and complexity involved in integrating dual-power systems. Unlike vehicles with a single propulsion source, hybrids necessitate the concurrent production and intricate synchronization of internal combustion engines, electric motors, and high-voltage batteries. This mandates manufacturers to navigate costly and complex supply chains for essential raw materials and semiconductors, leading to considerably elevated production overheads. As these input expenses rise, it becomes increasingly challenging to sustain competitive pricing, which in turn compresses profit margins and diminishes capital available for vital industrial expansion. This economic burden directly impedes the market's capacity to scale operations in response to increasing demand. The inability to effectively absorb these high costs discourages commitments to long-term manufacturing initiatives, as evidenced by the German Association of the Automotive Industry (VDA)'s 2025 report that 80% of medium-sized automotive companies planned to postpone, relocate, or cancel investments due to uncompetitive cost structures and worsening business conditions.

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As a result, the sector experiences stagnant production capacity, hindering the widespread adoption of hybrid technologies, especially in price-sensitive regions.

Market Trends

The market is witnessing a significant structural shift with the advent of Dedicated Hybrid Transmission (DHT) systems, where electric motors are now fully integrated within the gearbox housing, moving away from add-on designs. This architectural advancement, typified by electrified dual-clutch transmissions (eDCT), facilitates seamless torque blending and more compact packaging, crucial for optimizing space within contemporary hybrid vehicle platforms. Manufacturers are intensely scaling specialized production lines to support this integration, transcending conventional general-purpose transmissions. For example, Stellantis confirmed this strategic redirection in February 2025, as reported by Mobility Portal Europe in 'Stellantis to Produce 300,000 Hybrid Transmissions in Italy', by announcing localized manufacturing of eDCT modules at its Termoli facility, aiming for an annual output of 300,000 units to cater to its growing hybrid vehicle fleet. Concurrently, a critical transition is occurring towards Silicon Carbide (SiC) power electronics to significantly boost thermal efficiency and power density in high-voltage inverters. Distinct from traditional silicon components, SiC technology enables considerably higher switching frequencies and reduced energy losses, which are essential for extending the electric-only range of plug-in hybrids. This increasing demand is compelling suppliers to commercialize sophisticated modules capable of managing higher voltages while simultaneously minimizing system weight. Gasgoo reported in August 2025 that Schaeffler initiated mass production of its 900-volt silicon carbide power module inverters at its Tianjin plant, achieving an impressive peak system efficiency of 99.5% through enhanced packaging.

Key Market Players

Robert Bosch GmbH

DENSO Corporation

ZF Friedrichshafen AG

Aisin Corporation

BorgWarner Inc.

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Continental AG

Magna International Inc.

Valeo SA

Hitachi Astemo, Ltd.

Schaeffler AG

Report Scope

In this report, the Global Hybrid Vehicle Powertrain Components Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Hybrid Vehicle Powertrain Components Market, By Vehicle Type

Passenger Car

Light Commercial Vehicle (LCV)

Medium & Heavy Commercial Vehicle (M&HCV)

Hybrid Vehicle Powertrain Components Market, By Propulsion

HEV

PHEV

Hybrid Vehicle Powertrain Components Market, By Component

Battery

Motor

Controller

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- Engine
- Transmission
- Others

Hybrid Vehicle Powertrain Components Market, By Region

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia Pacific
  - China
  - India
  - Japan
  - Australia
  - South Korea

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South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Hybrid Vehicle Powertrain Components Market.

Available Customizations:

Global Hybrid Vehicle Powertrain Components Market report with the given market data, TechSci 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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