

Saudi Arabia Electric Commercial Vehicle Market By Vehicle Type (Truck, Bus), By Propulsion Type (Battery Electric Vehicle (BEV), Plug-In Hybrid Vehicle (PHEV), Fuel Cell Electric Vehicle (FCEV)), By Battery Type (Less Than 50 kwh, 50 to 250 kwh, Above 250 kwh), Regional, Competition, Forecast & Opportunities, 2018-2028

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Abstracts

Saudi Arabia Automobile Market has valued at USD 50 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.25%. Rapid urbanization, an increase in the disposable income of middle-class families, and the introduction of new and better-performing vehicles in the market are driving the sales of automobiles in the country. The growing logistics and e-commerce industry and the need to develop an efficient supply chain are expected to accelerate the demand for commercial vehicles in the coming years. Also, the supportive government policies to boost the automotive industry and rise in efforts to attract original equipment manufacturers in the country are expected to create numerous growth opportunities for the market players over the next five years.

Key Market Drivers

Economic Diversification and Vision 2030

One of the primary drivers of the Saudi Arabian automobile market is the ambitious economic diversification agenda set forth by the government in its Vision 2030 plan. Historically, Saudi Arabia has been heavily dependent on oil revenue, and the government recognized the need to diversify its economy to reduce this dependence.

The Vision 2030 plan, announced in 2016, has introduced a series of reforms and initiatives aimed at transforming the country into a more diversified and sustainable economy. As part of Vision 2030, the government has been investing in infrastructure development, tourism, and entertainment projects. This has contributed to a boost in consumer confidence and increased disposable income, leading to higher automobile sales. The government's emphasis on diversifying the economy has led to initiatives aimed at encouraging local automobile manufacturing. Companies like Saudi Arabian Automotive Manufacturing Company (SAAMCO) have been established to produce vehicles locally, reducing the country's reliance on imports. The Vision 2030 plan also includes a strong commitment to environmental sustainability, leading to an increased focus on electric vehicles (EVs) and green technologies. This has driven investments in EV infrastructure and created a growing market for eco-friendly vehicles.

Growing Population and Urbanization

Saudi Arabia has experienced significant population growth in recent years, with a predominantly young demographic. The combination of population growth and urbanization has driven the demand for automobiles. Urbanization has led to the development of infrastructure, such as roads and highways, which, in turn, has made owning a car more attractive and convenient. Saudi cities like Riyadh, Jeddah, and Dammam have seen a substantial influx of people seeking employment and business opportunities, leading to an increased need for personal transportation. With more people living in urban areas, the demand for mobility solutions has risen. As a result, the automobile market has expanded to accommodate different segments of the population. In some urban areas, traffic congestion and limited public transportation options have made owning a car a necessity for daily commuting.

Changing Consumer Preferences

The Saudi Arabian automobile market has witnessed a shift in consumer preferences, driven by evolving socio-economic factors and changing lifestyle choices. This shift has had a significant impact on the types of vehicles that are popular in the market. Sport Utility Vehicles (SUVs) have gained immense popularity in Saudi Arabia. Their larger size and versatility appeal to consumers seeking safety, comfort, and adaptability in various terrains. Additionally, SUVs are often favored for their spacious interiors and ability to accommodate large families. The demand for luxury and high-end vehicles has surged, reflecting a growing segment of affluent consumers in the country. Brands like Mercedes-Benz, BMW, and Audi have witnessed strong sales as consumers seek premium features and brands. Modern Saudi consumers are increasingly tech-savvy

and desire advanced infotainment systems, connectivity, and smart features in their vehicles. This has led to a push for more technologically advanced cars and a growing market for EVs.

Regulatory Changes and Liberalization

In recent years, Saudi Arabia has undertaken regulatory changes and liberalization efforts to open up the automobile market. These changes have encouraged competition, increased consumer options, and stimulated market growth. In 2018, Saudi Arabia lifted the ban on women driving, which has significantly expanded the potential customer base for the automobile market. The inclusion of women as drivers has resulted in a notable increase in car ownership among women and families. The government has made efforts to encourage competition in the automobile market by allowing more international automakers to establish dealerships in the country. This has led to a wider range of vehicle choices for consumers. Regulatory changes have also contributed to the growth of the used car market, as older vehicles can now be imported and sold, providing more affordable options for budget-conscious consumers.

Technological Advancements and Connectivity

The Saudi Arabian automobile market has seen an influx of advanced technologies and connectivity features. These innovations have played a significant role in influencing purchasing decisions and shaping market trends. Modern vehicles come equipped with sophisticated infotainment systems that offer features like GPS navigation, smartphone integration, and advanced audio systems. Consumers are increasingly seeking these amenities in their cars. The demand for vehicles with advanced safety features such as adaptive cruise control, lane-keeping assist, blind-spot monitoring, and automatic emergency braking has grown significantly as consumers prioritize safety. Vehicles with advanced connectivity and telematics systems are highly sought after. Features like remote start, vehicle tracking, and diagnostic alerts are becoming increasingly common in the market. As part of the broader global trend, the Saudi market has also seen a growing interest in electric vehicles (EVs) and autonomous driving technologies. Automakers are introducing EV models, and the government is investing in charging infrastructure to support this shift.

Key Market Challenges

Economic Dependency on Oil and Fluctuating Oil Prices

One of the most significant challenges faced by the Saudi Arabian automobile market is the country's strong economic dependence on oil revenues. Saudi Arabia has historically relied on oil as a primary source of income and government funding. This economic model makes the automobile market susceptible to fluctuations in global oil prices and affects various aspects of the industry. The performance of the automobile market is closely tied to the overall economic health of the country. When oil prices are high and the economy is booming, consumers have more disposable income, which drives higher car sales. Conversely, during periods of low oil prices, there is a decrease in consumer spending, leading to reduced demand for new vehicles. The Saudi government's budget is heavily reliant on oil revenues, which can lead to budget deficits during periods of low oil prices. This can result in austerity measures and reduced government spending on infrastructure projects and subsidies that could otherwise stimulate the automobile market.

Oil price fluctuations also impact government fiscal policies. For example, a decrease in oil revenues can lead to changes in taxation, fuel prices, and subsidies, which can affect vehicle ownership costs and consumer preferences. To address this challenge, Saudi Arabia has initiated the Vision 2030 plan, which aims to diversify the economy and reduce its dependence on oil. Diversification efforts include investments in non-oil sectors, such as tourism and entertainment, which can stimulate economic activity and, in turn, increase consumer spending on automobiles.

Regulatory Hurdles and Import Tariffs

The Saudi Arabian automobile market is subject to a set of regulatory challenges that impact market dynamics, pricing, and consumer choices. Import tariffs, customs duties, and regulations play a critical role in the cost and availability of vehicles in the market. The Saudi government imposes relatively high import tariffs on vehicles, which can significantly increase the cost of new cars. These tariffs are implemented to encourage local manufacturing and protect domestic industries. However, they make it challenging for automakers to offer competitive pricing to consumers. Customs duties on automobile parts and components can further raise manufacturing costs, making it less cost-effective for international car manufacturers to set up production plants in Saudi Arabia. This can limit the availability of locally manufactured vehicles. Automakers must adhere to specific technical regulations and standards set by the Saudi Standards, Metrology, and Quality Organization (SASO). Meeting these requirements can be a time-consuming and costly process, particularly for small manufacturers and new entrants to the market.

Consumer Debt and Financing Challenges

Consumer debt and financing challenges are significant concerns in the Saudi Arabian automobile market. High levels of consumer debt, coupled with a limited understanding of financial products and interest rates, impact the ability of individuals to purchase new vehicles and access financing options. High levels of consumer debt, often associated with personal loans and credit cards, can reduce the purchasing power of individuals, making it difficult to afford car loans and down payments for new vehicles. Interest rates on car loans can be relatively high in Saudi Arabia, and these rates vary among banks and financial institutions. The cost of financing can be a deterrent for potential car buyers, particularly for those with lower credit scores. Many consumers may not fully understand the various financing options available to them, which can result in suboptimal choices when purchasing a car. A lack of financial literacy can lead to unfavorable financing terms. Efforts to increase financial literacy and educate consumers about the best financing options for their individual circumstances could help address this challenge. The government and financial institutions could collaborate to offer more favorable car loan terms, making vehicle ownership more accessible to a broader range of consumers.

Infrastructure and Traffic Congestion

Saudi Arabia has witnessed rapid urbanization and population growth, which has led to an increase in traffic congestion and demand for efficient transportation infrastructure. The country's vast geography, characterized by sprawling cities and long distances between urban centers, presents unique infrastructure challenges for the automobile market. Major cities like Riyadh and Jeddah have experienced severe traffic congestion, leading to longer commute times and frustration among drivers. This congestion can discourage car ownership in urban areas. Efforts to improve and expand road networks have been ongoing, but there is still a need for substantial infrastructure development to accommodate the growing number of vehicles and provide efficient transportation solutions. To alleviate congestion and encourage the use of public transportation, Saudi Arabia has invested in metro and bus systems in cities like Riyadh and Jeddah. These alternatives provide an option for urban commuters, potentially reducing the need for personal vehicles. Traffic congestion contributes to increased air pollution and environmental concerns. As sustainability becomes a more significant consideration, the impact of congestion on the environment is a growing challenge for industry. Saudi Arabia can invest further in public transportation infrastructure, develop more efficient traffic management systems, and promote sustainable urban planning to alleviate congestion. These efforts would not only improve the quality of life for residents but also

make car ownership more appealing and practical.

Environmental Sustainability and Green Initiatives

With a global focus on reducing carbon emissions and transitioning to more sustainable forms of transportation, environmental sustainability is a challenge that the Saudi Arabian automobile market must address. While the government has initiated several green initiatives, such as Vision 2030, significant hurdles remain. The predominantly high demand for large, fuel-inefficient vehicles, such as SUVs, contributes to increased fuel consumption and emissions. Efforts to promote fuel efficiency and reduce emissions have been met with resistance from consumers. While electric vehicles (EVs) are gaining popularity, the infrastructure for EV charging remains underdeveloped, particularly in rural areas. Without a comprehensive charging network, EV adoption faces limitations. Saudi Arabia has introduced environmental standards and regulations to control emissions, but enforcement and compliance monitoring can be challenging, hindering progress in achieving green transportation goals. Promoting awareness about the benefits of environmentally friendly vehicles and sustainable transportation practices is crucial. Many consumers may not fully understand the impact of their choices on the environment.

Key Market Trends

Electrification and the Rise of Electric Vehicles (EVs)

One of the most prominent trends in the Saudi Arabian automobile market is the increasing interest in electric vehicles (EVs). This trend aligns with global efforts to reduce carbon emissions and transition towards more sustainable and environmentally friendly transportation solutions. In Saudi Arabia, this trend is primarily driven by government initiatives, changing consumer attitudes, and advancements in EV technology. The Saudi government has recognized the importance of reducing the country's carbon footprint and has introduced policies to promote the adoption of EVs. For instance, in 2019, the Saudi Standards, Metrology, and Quality Organization (SASO) issued technical regulations for EVs and their charging infrastructure, providing a regulatory framework for their adoption. As consumers become more environmentally conscious and seek to reduce their carbon footprint, there has been a growing interest in electric and hybrid vehicles in Saudi Arabia. This trend is particularly visible among the younger generation, who are increasingly inclined to choose sustainable and energy-efficient transportation options. To support the growth of EVs, Saudi Arabia has been investing in charging infrastructure. Companies like Aramco and ACWA Power have

made substantial commitments to expand the charging network across the country, making it more convenient for consumers to own and operate electric vehicles. The Saudi government has also encouraged local manufacturing of EVs to reduce reliance on imports. Companies like Saudi Arabian Automotive Manufacturing Company (SAAMCO) have taken steps towards producing electric vehicles within the country, contributing to the growth of the local automotive industry. As this trend continues to gain momentum, it is expected to shape the Saudi automobile market significantly, leading to increased EV adoption, reduced carbon emissions, and a shift in consumer preferences towards sustainable mobility solutions.

Women's Empowerment and Increased Female Drivers

In 2018, Saudi Arabia made a historic decision to lift the ban on women driving, marking a significant societal shift and impacting the automobile market in several ways. This change has not only empowered women but also expanded the customer base for the automotive industry. The decision to allow women to drive has led to a surge in the number of female drivers in Saudi Arabia. Many women now have the autonomy to purchase and operate their vehicles, leading to an increased demand for automobiles in the country. With more women entering the driver's seat, the automobile market has seen a shift in vehicle preferences. Smaller and more compact cars are gaining popularity among female drivers, as they often prioritize convenience and ease of maneuverability. Women drivers often prioritize safety features and advanced technology in their vehicles. The demand for vehicles equipped with advanced safety systems, such as automatic emergency braking and parking assistance, has increased. Automotive manufacturers and dealerships have adapted their marketing strategies to cater to the growing number of female customers. They offer women-centric services and create campaigns that resonate with female drivers. This trend has not only contributed to the growth of the Saudi automobile market but also brought about positive social and economic changes by enhancing the mobility and independence of women in the country.

Shift towards SUVs and Crossovers

Saudi Arabia, like many other markets worldwide, has witnessed a significant shift in consumer preferences towards Sports Utility Vehicles (SUVs) and crossovers. This trend has reshaped the market and influenced automakers' strategies and offerings in the country. The popularity of SUVs and crossovers in Saudi Arabia can be attributed to their adaptability to different terrains and road conditions. Saudi Arabia's varied landscapes, including deserts and mountains, make SUVs an attractive choice for

consumers looking for versatile and reliable vehicles. SUVs and crossovers are known for their spacious interiors, making them ideal for large families and those who prioritize comfort during their journeys. The need for accommodating extended families during travels and daily commutes has driven the demand for these vehicles. SUVs are often perceived as safer due to their larger size and elevated driving position, a consideration that resonates with safety-conscious consumers. The luxury SUV segment, featuring brands like Range Rover, Mercedes-Benz GLE, and BMW X5, has gained traction among affluent consumers in Saudi Arabia. The combination of luxury and versatility has made these vehicles particularly popular. As a result of this trend, many automakers have adapted their product portfolios to cater to the growing demand for SUVs and crossovers, and they continue to play a pivotal role in the Saudi Arabian automobile market.

Digital Transformation and E-commerce in Auto Retail

The rise of digital transformation and e-commerce has disrupted various industries, and the Saudi Arabian automobile market is no exception. The digitalization of the automotive retail process has brought about numerous changes, from vehicle research and purchasing to after-sales services. Many automotive dealerships and platforms have established online sales channels, allowing consumers to research, configure, and purchase vehicles through the internet. This trend has gained traction, especially during the COVID-19 pandemic, when online shopping and contactless transactions became increasingly important. Virtual showrooms and 360-degree vehicle tours have become common in the Saudi automobile market. Consumers can explore vehicles from the comfort of their homes, enhancing their pre-purchase experience. Digital platforms also offer financing and insurance solutions, simplifying the paperwork and approval processes. This convenience has made it easier for consumers to complete their vehicle purchases. After-sales services, including maintenance and repairs, have also been digitized. Consumers can schedule maintenance appointments and access vehicle service records online, ensuring smoother post-purchase experiences. Online platforms have enabled customers to leave reviews and ratings, influencing the purchasing decisions of prospective buyers. This trend has made customer satisfaction and transparency critical for dealerships and manufacturers. The integration of digital technologies in the automobile market has improved convenience, transparency, and accessibility for consumers, while also streamlining operations for industry stakeholders.

Ride-Sharing, Car Subscription Services, and Shared Mobility

The concept of shared mobility, including ride-sharing services and car subscription

models, has been gaining momentum in Saudi Arabia. This trend reflects changing mobility preferences, especially among urban consumers. Ride-sharing platforms like Uber and local alternatives have become popular in major Saudi cities. These services offer an affordable and convenient transportation option, particularly for daily commutes. Car subscription services, such as monthly or annual vehicle rentals, have gained traction. These services provide flexibility to consumers who prefer not to commit to long-term ownership. Users can switch between different vehicle models based on their needs. Carpooling has become a cost-effective and environmentally friendly transportation solution. Several platforms in Saudi Arabia encourage commuters to share rides and reduce the number of single-occupancy vehicles on the road.

Segmental Insights

Propulsion Type Insights

The ICE Vehicle dominates the market segment. Conventional ICE vehicles, which run on gasoline and diesel, still dominate the Saudi Arabian automobile market. Challenges in this category include Fluctuations in global oil prices directly impact the cost of gasoline and diesel in Saudi Arabia. This price volatility can affect consumers' fuel expenses and the overall cost of ownership for conventional vehicles. As the global automotive industry moves towards cleaner and more fuel-efficient vehicles, conventional ICE vehicles continue to contribute to air pollution and greenhouse gas emissions. This challenge necessitates the adoption of stricter emission standards and the promotion of cleaner fuels. Despite being an oil-producing country, Saudi Arabia still imports a significant portion of its refined gasoline and diesel, which can lead to economic vulnerabilities, especially when oil prices rise. Electric vehicles, which run solely on electricity, present unique challenges and opportunities in the Saudi Arabian market: The development of an extensive and reliable EV charging infrastructure is critical for widespread EV adoption. While progress has been made, particularly in urban areas, rural regions may still lack sufficient charging options. While the Saudi government has introduced initiatives to support EV adoption, including subsidies and reduced customs duties, continuous regulatory and policy support is needed to promote the growth of the EV market.

Regional Insights

The Northern and Central Region dominate the market in Saudi Arabia Automobile Market. The Central Region, with Riyadh at its core, is the economic and administrative hub of Saudi Arabia. It has a diverse population, including both Saudi nationals and a

significant expatriate community. The region boasts a strong economy, with a focus on finance, commerce, and industry. The Central Region has the highest consumer spending on automobiles, ranging from economy cars to luxury and high-end models. Diverse population contributes to a wide range of preferences, from practical and budget-friendly vehicles to high-performance and luxury cars. Strong economic activity stimulates demand for commercial vehicles and fleets. Makkah Province, part of the western region, is significant for its religious and tourism activities, including the annual Hajj pilgrimage and Umrah. The region experiences a surge in population during religious events, leading to increased traffic and congestion. The western region provides opportunities for car rental companies and transportation services due to the influx of pilgrims and tourists. There is a need for a well-managed and efficient transportation system to accommodate the temporary population increase during religious events. Tourists' preferences for comfortable and reliable transportation options impact the market.

Key Market Players

Toyota Motor Corporation

Hyundai Motor Company

Stellantis

MAN SE

Honda Motor Company

Ford Motor Company

Daimler AG

AB Volvo

Hino Motors, Ltd

Tata Motors Limited

Report Scope:

In this report, the Saudi Arabia Automobile Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Automobile Market, By Vehicle Type:

Two Wheeler

Passenger Car

Commercial Vehicle

OTR

Saudi Arabia Automobile Market, By Propulsion Type:

ICE

Electric

Saudi Arabia Automobile Market, By Battery Capacity:

Manual

Automatic

Saudi Arabia Automobile Market, By Region:

Northern & Central

Eastern

Western

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Saudi Arabia Automobile Market.

Available Customizations:

Saudi Arabia Automobile 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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