

Automotive Hybrid Starter Generator Market By Type (12-Volt, 48-Volt, Others) , By Application (Passenger Cars, Light Commercial Vehicles, Heavy Commercial Vehicles) By Power Rating (low power (up to 15 kW) , Medium Power (15-30 kW) , high power (above 30 kW)) By Component (Electric Motor/Generator, Power Electronic Controller, Battery) : Global Opportunity Analysis and Industry Forecast, 2024-2033

Market Report | 2024-07-01 | 456 pages | Allied Market Research

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Report description:

Automotive Hybrid Starter Generator (HSG) Market

The automotive hybrid starter generator (HSG) market was valued at \$17.4 billion in 2023 and is projected to reach \$26.3 billion by 2033, growing at a CAGR of 4.5% from 2024 to 2033.

Automotive HSG is an integrated system that assimilates the functioning of a starter motor and an alternator. The generator is a pivotal component of hybrid vehicles as it is utilized to start the engine, generate electricity, and enhance fuel efficiency by regenerating energy during braking and offering additional power during acceleration. The automotive hybrid starter generator (HSG) market involves the production, distribution, and sales of these integrated systems designed to refine the performance and efficiency of hybrid vehicles.

The automotive hybrid starter generator (HSG) market is significantly driven by increase in demand for fuel efficiency. Consumers now significantly prioritize fuel efficiency while purchasing vehicles owing to fluctuation in fuel prices and rise in environmental awareness. Furthermore, surge in the production of vehicles, along with advancements in generator technology is boosting the demand for automotive HSG. The trend of incorporating automotive HSG with smart features such as remote monitoring and deployment into vehicle management systems is gaining pace in the market. This assimilation is enabling the predictive maintenance of the generator, thus boosting the reliability of vehicles.

However, availability of limited infrastructure for hybrid vehicles hampers the growth of the automotive hybrid starter generator (HSG) market. Hybrid vehicles require access to charging stations for optimal operation and several regions, specifically

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developing countries, possess inadequate number of charging stations. This shortage prevents consumers from purchasing hybrid vehicles, hence lowering the demand for hybrid starter generators. For instance, HT Auto, website offering comprehensive coverage of Indian and international automobile industry, lists a total of only 1495 charging stations across 134 cities in India. With upsurging trend of hybrid and electric vehicles, this number is significant short for the widespread adoption of the vehicles.[]
Segment Review[]

The automotive hybrid starter generator (HSG) market is segmented into type, application, power rating, component, and region. On the basis of type, the market is divided into 12-volt, 48-volt, and others. By application, it is classified into passenger cars, light commercial vehicles, and heavy commercial vehicles. Depending on power rating, it is categorized into low power (up to 15 kW), medium power (15-30 kW), and high power (above 30 kW). As per component, it is divided into electric motor/generator, power electronic controller, and battery. Region wise, it is analyzed across North America, Europe, Asia-Pacific, and LAMEA.[]

Key Findings[]

On the basis of type, the 12-volt segment is expected to experience rapid growth throughout the forecast period.

By application, the heavy commercial segment is projected to dominate by 2033.

Depending on power rating, the medium power (15-30kW) segment is anticipated to be the highest shareholder during the forecast period.

As per component, the electric motor/generator segment is predicted to acquire a high market share during the forecast period.

Region wise, Asia-Pacific is expected to be the largest revenue generator by 2033.[]

Competition Analysis[]

The major players operating in the global automotive hybrid starter generator (HSG) market include Continental AG, ZF Friedrichshafen AG, BOSCH, Delphi, SEG-Automotive, Hyundai Mobis Co Ltd., Mitsubishi Electric, Denso, Valeo, and Hitachi Automotive Systems Ltd. These players have adopted various key developmental strategies such as business expansion, new product launches, and partnerships to strengthen their foothold in the market.

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- SWOT Analysis

Key Market Segments

By Type

- 12-Volt

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- 48-Volt

- Others

By Application

- Passenger Cars

- Light Commercial Vehicles

- Heavy Commercial Vehicles

By Power Rating

- low power (up to 15 kW)

- Medium Power (15-30 kW)

- high power (above 30 kW)

By Component

- Electric Motor/Generator

- Power Electronic Controller

- Battery

By Region

- North America

- U.S.

- Canada

- Mexico

- Europe

- France

- Germany

- Italy

- Spain

- UK

- Russia

- Rest of Europe

- Asia-Pacific

- China

- Japan

- India

- South Korea

- Australia

- Thailand

- Malaysia

- Indonesia

- Rest of Asia-Pacific

- LAMEA

- Brazil

- South Africa

- Saudi Arabia

- UAE

- Argentina

- Rest of LAMEA

- Key Market Players

- Continental AG

- ZF Friedrichshafen AG

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- BOSCH
- Delphi
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- Hyundai Mobis Co Ltd.
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- Denso
- Valeo
- Hitachi Automotive Systems Ltd.

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