

Saudi Arabia Automotive Battery Market By Type (Starter Battery, EV Battery), By Vehicle Type (Passenger Car, Two-Wheeler, LCV), By Battery Type (Lead Acid, Lithium Ion, and Others), By Region, Competition, Forecast & Opportunities, 2019-2029F

Market Report | 2024-12-20 | 85 pages | TechSci Research

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Report description:

Saudi Arabia Automotive Battery market was valued at USD 2851.73 Million in 2023 and is expected to reach USD 3487.52 Million by 2029 with a CAGR of 15.82% during the forecast period. The Saudi Arabia automotive battery market is experiencing growth driven by increased demand in both the conventional and electric vehicle (EV) sectors. As the Kingdom shifts toward Vision 2030 goals to diversify its economy, the automotive sector is receiving significant investments, spurring demand for high-quality, durable batteries. Lead-acid batteries dominate the market due to their cost-effectiveness and widespread use in traditional vehicles. However, there is a notable shift toward lithium-ion batteries, aligning with a global trend favouring EVs and hybrid vehicles.

Automotive battery suppliers in Saudi Arabia are witnessing demand growth from government fleet electrification initiatives and rising consumer interest in environmentally friendly options. The market is also impacted by high temperatures, which challenge battery lifespan and performance, creating a need for advanced, heat-resistant battery technologies. International manufacturers have partnered with local entities, enhancing distribution channels and after-sales services. This trend highlights the competitive landscape as companies vie for a foothold in the expanding market.

Overall, Saudi Arabia's automotive battery sector is set to benefit from infrastructure developments, economic reforms, and a gradual shift toward sustainable energy sources, making it an increasingly attractive market in the Middle East.

Market Drivers

Vision 2030 and Diversification of the Economy

Saudi Arabia's Vision 2030, a long-term initiative aimed at reducing the Kingdom's dependence on oil by diversifying its economy, has impacted the automotive sector significantly. The government is pushing for a shift towards renewable energy, with an

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increased focus on clean and efficient transportation solutions, including electric vehicles (EVs). This transition has raised demand for advanced battery technologies, such as lithium-ion batteries, that support EVs and hybrid vehicles. Vision 2030 initiatives also encourage local manufacturing, which has led to partnerships between international battery manufacturers and local companies to establish production facilities in Saudi Arabia. As a result, Vision 2030 is a cornerstone driving the expansion of the automotive battery market.

Increasing Demand for Electric Vehicles (EVs)

Although internal combustion engine (ICE) vehicles still dominate Saudi Arabia's roads, there is a rising demand for EVs due to global environmental concerns and the government's support for clean energy. EV adoption is in its early stages in Saudi Arabia, yet it is poised to grow rapidly as the infrastructure for charging stations improves and awareness around EV benefits rises. As a key component of EVs, batteries are becoming a crucial area of focus. The demand for lithium-ion batteries is particularly high, given their efficiency, energy density, and long lifespan. Consequently, the shift towards EVs is a major driver for innovation and investment in the automotive battery market, creating new revenue streams and stimulating competition among manufacturers. For instance, in August 2024 Amara Raja Advanced Cell Technologies Private Limited (ARACT), a subsidiary of Amara Raja Energy & Mobility Limited (ARE&M), is set to formalize a strategic partnership with Ather Energy through a memorandum of understanding (MoU). This collaboration aims to strengthen the EV battery supply chain, supporting Ather Energy's growing demand for high-quality battery solutions. By aligning with a leading EV manufacturer, Amara Raja reinforces its commitment to advancing battery technology in the electric mobility sector.

Growth of the Automotive Aftermarket

The demand for replacement automotive batteries in the Kingdom is high due to the challenging environmental conditions, such as extreme heat, which can shorten battery life. As a result, the automotive aftermarket is a significant segment, as vehicle owners seek reliable battery replacements. The large population of existing internal combustion vehicles also contributes to the high demand in this segment. The presence of major international brands and local suppliers offering a variety of automotive battery products for replacement purposes makes the aftermarket a competitive and fast-growing part of the market. For instance, in March 2024, EnerSys, a global leader in stored energy solutions for industrial applications, has introduced a significant enhancement in its Thin Plate Pure Lead (TPPL) battery technology with the new Accelerated Throughput Package (ATP) available for select NexSys TPPL batteries. This advanced feature aims to boost battery performance, enabling faster charging and increased energy throughput, meeting high-demand operational needs. EnerSys continues to drive innovation in energy solutions, reinforcing its commitment to providing durable and efficient power for industrial applications worldwide.

Technological Advancements and Innovations

Battery manufacturers are constantly innovating to improve battery life, efficiency, and heat resistance—critical factors in Saudi Arabia's harsh climate. Enhanced lead-acid and lithium-ion batteries are being developed to withstand high temperatures while delivering reliable performance. Advanced battery management systems (BMS) are also being incorporated to monitor and optimize battery performance, thereby extending the lifespan of batteries in extreme weather conditions. Additionally, research and development efforts are focused on next-generation battery technologies that could further reduce charging times and increase capacity, making batteries more durable and efficient for both conventional and electric vehicles. For example, in April 2024, CATL has introduced an advanced EV battery with a range of 1-million-mile and a 15-year lifespan, marking a milestone in battery durability and sustainability. This breakthrough product is engineered to extend the operational life of electric vehicles, significantly reducing replacement needs and long-term costs. CATL's innovation supports the growing demand for reliable, long-lasting EV solutions, positioning the company as a leader in cutting-edge battery technology.

Expansion of the Construction and Industrial Sectors

The booming construction and industrial sectors in Saudi Arabia, there is an increased demand for commercial vehicles, which also drives demand for automotive batteries. Heavy machinery and commercial vehicles require durable and efficient batteries to withstand intensive use in industrial settings. As these sectors grow, so does the need for batteries with enhanced capacity and lifespan, creating a ripple effect that stimulates demand in the automotive battery market.

The Saudi Arabian automotive battery market is poised for substantial growth, supported by government-led initiatives, technological advancements, and an increasing shift towards electric vehicles. Vision 2030 acts as a major catalyst, encouraging eco-friendly practices and local manufacturing, while the hot climate and industrial expansion drive demand for durable and

high-performance batteries. With consumer awareness of eco-friendly options on the rise and companies investing in R&D, the automotive battery market in Saudi Arabia is set to evolve rapidly, presenting abundant opportunities for growth and innovation

Key Market Challenges

The automotive battery market in Saudi Arabia is advancing rapidly, driven by increasing demand for both electric vehicles (EVs) and high-performance batteries. However, the market faces several challenges that could impact growth and limit the industry's ability to reach its full potential. Understanding these obstacles is critical for stakeholders, manufacturers, and policymakers who aim to strengthen Saudi Arabia's position in the global automotive sector.

Limited Charging Infrastructure for EVs

One of the major challenges facing the Saudi Arabian automotive battery market, particularly for EVs, is the lack of sufficient charging infrastructure. While the government has announced plans to promote EV adoption under Vision 2030, the current charging network is still in its infancy. This scarcity of public charging stations hinders the feasibility of EVs as a reliable option for Saudi consumers. Until the charging infrastructure is expanded, it will be challenging for the EV segment-and, by extension, the demand for EV batteries-to gain substantial traction in the Kingdom.

Harsh Climate Impact on Battery Lifespan

Saudi Arabia's extremely hot climate presents a significant challenge for automotive battery performance and lifespan. High temperatures can accelerate battery degradation, leading to a shorter lifespan and reduced efficiency. In particular, lead-acid batteries, widely used in conventional vehicles, are more vulnerable to heat damage. This environmental factor makes it difficult for manufacturers to ensure that batteries perform optimally and reliably, increasing the need for high-temperature-resistant batteries, which are often more expensive to produce and maintain. For instance, in May 2024, Amara Raja Energy and Mobility Ltd. is poised to launch its new lead-acid battery recycling facility in Tamil Nadu by late November. This greenfield project is set to enhance the company's sustainability efforts by supplying 25-30% of its lead requirements through recycled materials. The plant is anticipated to optimize material costs, potentially reducing lead recovery expenses by 1.5-2% as efficiencies improve. This strategic initiative underscores Amara Raja's commitment to sustainable operations and cost-effective manufacturing.

High Initial Cost of EV Batteries

While the demand for EVs is slowly growing, the high cost of EV batteries remains a key obstacle for consumers in Saudi Arabia. EV batteries constitute a substantial portion of the vehicle's total cost, making EVs more expensive upfront compared to conventional vehicles. Without substantial government subsidies or incentives, the higher price point could deter potential buyers. Moreover, the cost of lithium-ion and advanced battery technologies, which are critical for EV performance, remains high, creating a barrier to widespread adoption and impacting the growth of the EV battery market segment.

Limited Skilled Workforce and Technical Expertise

The automotive battery industry requires specialized knowledge and technical expertise for R&D, production, and maintenance, especially with advanced battery technologies like lithium-ion batteries. Currently, Saudi Arabia has a limited number of skilled professionals in this domain, which can hinder local production and innovation. Recruiting, training, and retaining skilled labour is both time-consuming and costly, and the lack of technical expertise may slow down the country's ability to become self-reliant in automotive battery manufacturing. Without adequate training programs and industry partnerships, this skills gap could hinder market growth.

Dependency on Imported Raw Materials

Saudi Arabia's automotive battery manufacturing is heavily dependent on imported raw materials, such as lithium, nickel, and cobalt, which are essential for advanced battery technologies. This dependency exposes the industry to fluctuations in global raw material prices, supply chain disruptions, and geopolitical issues. Additionally, international price volatility and transportation costs can lead to higher production costs, impacting the affordability and profitability of automotive batteries produced locally. Reducing dependency on imports by establishing strategic partnerships or investing in raw material alternatives would be essential to minimize this vulnerability.

Challenges in Battery Recycling and Waste Management

As battery use increases, so does the challenge of managing battery waste and recycling. Effective recycling infrastructure is currently limited in Saudi Arabia, especially for lithium-ion batteries, which require specialized handling due to hazardous

materials. The lack of a recycling system poses environmental risks and could lead to regulatory hurdles in the future. Establishing a sustainable battery recycling industry is essential, but the initial setup costs, logistics, and technological requirements make it a challenging endeavor for the market.

The Saudi Arabia automotive battery market holds immense growth potential, but overcoming these challenges is critical for sustainable progress. Expanding the EV charging infrastructure, developing heat-resistant battery solutions, addressing the high cost of EV batteries, and establishing a skilled workforce are all crucial steps to advance the market. Additionally, reducing dependency on imported raw materials and creating an effective battery recycling framework will support long-term growth. By addressing these challenges, Saudi Arabia can strengthen its automotive battery sector, contributing to its broader economic diversification goals under Vision 2030.

Key Market Trends

The automotive battery market in Saudi Arabia is experiencing significant transformation due to advancements in electric vehicle (EV) technology, government policy shifts, and the increasing demand for fuel-efficient vehicles. These trends indicate a promising future for the sector, supporting Saudi Arabia's Vision 2030 objectives of reducing its dependency on oil and diversifying the economy. Here are some key trends shaping the Saudi automotive battery market:

Growth of Electric Vehicles (EVs) and Demand for EV Batteries

The demand for electric vehicles in Saudi Arabia is steadily rising, driven by the global shift toward eco-friendly transportation and Saudi Vision 2030's focus on sustainability. As the Kingdom seeks to reduce its carbon footprint and meet sustainability goals, there is a growing demand for EV batteries, especially lithium-ion types known for their high energy density and longevity. This increase in EV adoption is encouraging local manufacturers to explore partnerships with global battery suppliers and invest in R&D for advanced battery technologies. The rising adoption of EVs will likely spur further development of battery charging infrastructure and incentivize both local and international battery manufacturers to expand their presence in Saudi Arabia. For example in August 2024, Samsung SDI's latest EV battery technology showcases a significant leap in range and durability, offering a 600-mile driving range and a 20-year lifespan. Built on advanced oxide solid-state technology, the battery achieves an impressive energy density of 500 Wh/kg-almost double that of today's standard automotive battery packs. This high-density design enables longer vehicle range and rapid charging in just 9 minutes, while also making the battery smaller, lighter, and safer compared to existing lithium-ion alternatives. Samsung's innovation positions it at the forefront of next-generation EV battery solutions, promising both efficiency and sustainability.

Expansion of Battery Recycling Initiatives

As the automotive battery market expands, Saudi Arabia is recognizing the need for sustainable practices in battery disposal and recycling. With EV and hybrid vehicle battery use on the rise, managing battery waste has become an environmental and economic priority. Recycling initiatives are being introduced, with companies and government agencies exploring efficient ways to recycle lithium-ion and lead-acid batteries, minimizing environmental impact. By investing in recycling technologies, Saudi Arabia can potentially recover valuable materials such as lithium and cobalt, contributing to a circular economy. This trend not only supports environmental goals but also aligns with cost-effective production, reducing reliance on imported raw materials.

Investment in Advanced Battery Technologies

To enhance battery performance and meet the demands of the harsh Saudi climate, manufacturers are increasingly focusing on advanced battery technologies. High temperatures can affect battery life and performance, and advancements in thermal management for batteries, especially in EVs, are critical. Consequently, manufacturers are exploring options like solid-state batteries, which offer improved safety, energy density, and longevity compared to conventional lithium-ion batteries. The interest in advanced technologies, including high-performance batteries tailored to extreme climates, indicates a trend towards innovation and market differentiation in the Saudi automotive battery industry.

Supportive Government Policies and Incentives

Saudi Arabia's Vision 2030 plan emphasizes sustainable economic growth and energy diversification, with supportive policies to boost the automotive and EV industries. Government incentives for electric vehicle ownership, reduced import tariffs on EV batteries, and tax relief for battery manufacturers are becoming prominent. These policies aim to encourage the adoption of EVs, increase demand for automotive batteries, and stimulate domestic battery manufacturing. Additionally, Saudi Arabia is forming partnerships with international players to leverage their expertise, creating a collaborative environment that attracts foreign

investment and strengthens the local battery production industry.

Shift Towards Smart and Connected Battery Solutions

The rise of smart cities and connected devices has influenced the automotive battery market to develop "smart" batteries equipped with advanced features. These batteries come with monitoring systems that track charge levels, health, and overall performance, which are particularly beneficial for fleet operators and EV owners. In Saudi Arabia, where fleet management is becoming increasingly digital, these smart battery solutions enhance efficiency, optimize performance, and reduce maintenance costs. As the market for smart solutions grows, battery manufacturers are likely to invest more in integrating digital technologies into battery systems, making them compatible with IoT frameworks and data analytics platforms.

The Saudi Arabia automotive battery market is rapidly evolving, with promising trends that support sustainable growth and align with the country's Vision 2030 goals. The rise of EV adoption, battery recycling, advanced battery technology, supportive government policies, and smart battery solutions are setting a progressive course for the industry. These trends not only strengthen the Kingdom's domestic automotive battery production capabilities but also pave the way for a robust, eco-friendly automotive ecosystem in Saudi Arabia. By continuing to innovate and adapt to global standards, the Saudi automotive battery market is well-positioned to play a leading role in the region's sustainable development.

Segmental Insights

Vehicle Insight Type

The dominance of passenger cars in the Saudi Arabia automotive battery market is driven by the increasing ownership of personal vehicles, urbanization, and rising disposable incomes. As passenger cars constitute a significant portion of the vehicle fleet, the demand for reliable automotive batteries remains high. Extreme climatic conditions, particularly heat, accelerate battery wear, leading to frequent replacements and boosting market growth. Additionally, growing consumer preference for advanced vehicles with enhanced electrical features increases the need for high-performance batteries. Government initiatives promoting electric and hybrid passenger cars further fuel this segment, solidifying the passenger car category's dominance in the market.

Region Insights

The Northern and Central regions of Saudi Arabia dominate the automotive battery market due to their high vehicle density, rapid urbanization, and economic activity. Cities like Riyadh serve as key automotive hubs, driving demand for batteries in passenger cars, commercial vehicles, and fleet operations. The regions' harsh climatic conditions, characterized by extreme heat, lead to faster battery replacement cycles, further boosting demand. Additionally, strong infrastructural development and a growing population have fueled vehicle ownership, cementing their market dominance. The increasing adoption of electric vehicles and government investments in the automotive sector also contribute to the growth of battery demand.

Key Market Players

- Exide Technologies
- Hankook & Company Co., Ltd.
- CSB Energy Technology Co., Ltd
- leoch International Technology Limited Inc
- GS Yuasa Corporation
- Robert Bosch GmbH
- Amara Raja Energy & Mobility Limited
- EnerSys
- CLARIOS, LLC
- Middle East Battery Company

Report Scope:

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

- Saudi Arabia Automotive Battery Market, By Type:
 - o Starter Battery
 - o CEV Battery
- Saudi Arabia Automotive Battery Market, By VehicleType:

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- o Passenger Car

- o Two-Wheelers

- o LCV

- Saudi Arabia Automotive Battery Market, By Battery Type:

- o Lead Acid

- o Lithium Ion

- o Other

- Saudi Arabia Automotive Battery Market, By Region:

- o Northern & Central Region

- o Western Region

- o Eastern Region

- o Southern Region

Competitive Landscape

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

Available Customizations:

Saudi Arabia Automotive Battery 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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