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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

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World Hybrid-Electric Vehicles

Industry Study with Forecasts to **2010, 2015 & 2020**

Study #2108 | October 2006 | \$5500 | 322 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
World Economic Overview	5
World Population Overview	10
Personal Income & Expenditure Trends	13
Households	14
World Light Vehicle Overview	16
Light Vehicle Production	18
Light Vehicle Sales	22
Automotive Components Industry Trends	23
Environmental & Regulatory Factors	27
Pricing Trends	31

TECHNOLOGY

General	33
Transition to Fuel Cells	34
Well-to-Wheels Efficiency & Pollution Comparisons	35
Hybrid-Electric ICE Powerplants	37
Series Hybrid	37
Parallel Hybrid	38
Mild Hybrid	39
Plug-In Hybrid Electric Vehicles	40
Advantages of the Hybrid-Electric ICE Powertrain	42
Commercialization Issues	43
Heat Management	44
Power Control Systems	44
Battery Life	45
Internal Combustion Engines	46
Spark Ignition	46
Diesel Internal	48
Fuel Cells	50
Energy Storage Technologies	52

COMPETITIVE & MARKET ASSESSMENTS

General	56
Competitive Assessment	62
Technology Readiness	65
S-Curve Headroom	66
Internal Combustion Engines	67
Hybrid-Electric ICEs	68
Fuel Cells	68
Electric Vehicles	69
Regulatory Compliance	70
Emissions Compliance	71
Fuel Efficiency Compliance	71
Safety Compliance	71
Infrastructure Readiness	72
Fueling Infrastructure	72
Service Infrastructure	73

Consumer Price/Benefits	74
Industry Focus	79
Technology Penetration Profiles	80
Market Pull	83
Regulatory Push	84
Rapid Penetration	84
Niche	85
Market Assessment	85
Automatic Transmissions	87
Power Steering	88
Air Conditioning	89
Antilock Brake Systems	90
Penetration Summary	91
Penetration Analysis for HEVs	92

WORLD OVERVIEW

General	95
Supply & Demand Trends	96
Hybrid-Electric Vehicle Demand by Region	98
Hybrid-Electric Vehicle Supply by Region	100
Hybrid-Electric Components Regional Demand	102
Foreign Trade	104

NORTH AMERICA

North America: General	106
Regional Light HEV Demand by Segment & Type	108
Regional Light HEV Supply by Country	112
Regional Light HEV Component Demand	114
United States	117
Canada	122
Mexico	126

WESTERN EUROPE

Western Europe: General	131
Regional Light HEV Demand by Segment & Type	134
Regional Light HEV Supply by Country	137
Regional Light HEV Component Demand	140
Germany	142
France	147
United Kingdom	151
Italy	155
Sweden	159
Other Western Europe	163

ASIA/PACIFIC

Asia/Pacific: General	166
Regional Light HEV Demand by Segment & Type	169
Regional Light HEV Supply by Country	172
Regional Light HEV Component Demand	174
Japan	177
China	182
South Korea	187
Australia	191
Other Asia/Pacific	194

OTHER REGIONS

Other Regions: General	198
Other Regions: Light HEV Demand by Segment & Type	200
Other Regions: Light HEV Supply by Region	202
Other Regions: Light HEV Component Demand	204
Latin America	205
Eastern Europe	210
Africa/Mideast	215

INDUSTRY STRUCTURE

General	219
Industry Composition & Market Share	220
Mergers/Acquisitions/Industry Restructuring	222
Research & Product Development	224
Manufacturing	229
Marketing	230
Distribution	231
Financial Issues & Requirements	233
Strategic Partnerships	234
OEM & Supplier Strategic Powertrain Options	242

COMPANY PROFILES

AC Propulsion	249
AeroVironment Incorporated	250
Aisin Seiki	251
Bayerische Motoren Werke	252
Bosch (Robert) GmbH	255
Continental AG	257
DaimlerChrysler AG	260
Delphi Corporation	264
DENSO Corporation	266
Eaton Corporation	268
Energy Conversion Devices	270
Exide Technologies	273
Ford Motor	274
Freescale Semiconductor	277
Fuji Electric Holdings	279
General Motors	280
GS Yuasa	283
Hitachi Limited	284
Honda Motor	286
Hyundai Motor	288
JATCO Limited	290
Johnson Controls	291
Keihin Corporation	294
Matsushita Electric Industrial	295
NEC Corporation	297
Nissan Motor	298
Peugeot SA	300
Saft Groupe	302
SANYO Electric	304
Siemens AG	306
Toshiba Corporation	308
Toyota Motor	309
Valeo SA	315
Visteon Corporation	317
Volkswagen AG	318
ZF Friedrichshafen AG	320

List of Tables/Charts

EXECUTIVE SUMMARY

- 1 Summary Table 3

MARKET ENVIRONMENT

- 1 World Gross Domestic Product by Region.....10
- 2 World Population by Region.....13
- 3 World per Capita GDP by Region14
- 4 World Households by Region.....16
- 5 World Light Vehicle Production.....21
- 6 World Light Vehicle Sales23

TECHNOLOGY

- Cht Conceptual Technology Migration Profile:
 ICE to Fuel Cell35
- Cht Comparison of Hybrid-Electric
 Powertrain Types42

COMPETITIVE & MARKET ASSESSMENTS

- Cht Options for Improving Light Vehicle
 Fuel Efficiency57
- Cht Honda Civic Hybrid Breakeven Versus
 Civic ICE Model US Market Example,
 2004 & 2006 Data58
- Cht Retail Fuel Prices, Selected Countries, 2005 .59
- Cht Probable HEV Market Penetration Profile61
- Cht Alternative Powerplant Forces at Work.....63
- Cht Light Vehicle Powerplant Technology
 Assessment65
- Cht Price/Benefits Analysis -- 2006-2007
 Model Years77
- Cht Price/Benefits Analysis on HEV Segments--
 2006-2007 Model Years79
- Cht Categorizing Technology Penetration
 Curves -- US Market Example82
- Cht Framework for Assessing Automotive
 Technology Penetration83
- Cht Automatic Transmission Penetration
 at Retail Price Analysis --
 US Passenger Car Example.....87
- Cht Power Steering Penetration at Retail Price
 Analysis -- US Passenger Car Example88
- Cht Air Conditioning Penetration at Retail Price
 Analysis -- US Passenger Car Example89
- Cht Antilock Brake System Penetration
 at Retail Price Analysis --
 US Passenger Car Example.....90
- Cht Summary of Technology Penetration
 Profiles -- US Example.....92
- Cht Estimated Full Hybrid-Electric Vehicle
 Option Pricing Trend --
 Worldwide Example94

WORLD OVERVIEW

- 1 World Light Hybrid-Electric Vehicle
 Supply & Demand98

- 2 World Light Hybrid-Electric Vehicle
 Demand by Region..... 100
- 3 World Light Hybrid-Electric Vehicle
 Supply by Region 102
- 4 World Hybrid-Electric Components
 Demand by Region..... 104

NORTH AMERICA

- 1 North America Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 108
- 2 North America Light Hybrid-Electric
 Vehicle Demand by Segment & Type 110
- Cht Historical & Potential Light HEV
 Introductions, North America
 Through 2010 111
- 3 North America Light Hybrid-Electric
 Vehicle Production by Country 114
- 4 North America Light Hybrid-Electric
 Vehicle Component Demand 117
- 5 United States Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 122
- 6 Canada Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 126
- 7 Mexico Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 130

WESTERN EUROPE

- 1 Western Europe Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 133
- 2 Western Europe Light Hybrid-Electric
 Vehicle Demand by Segment & Type 136
- Cht Historical & Potential Light HEV
 Introductions, Western Europe
 Through 2010 137
- 3 Western Europe Light Hybrid-Electric
 Vehicle Supply by Country..... 140
- 4 Western Europe Light Hybrid-Electric
 Vehicle Component Demand 142
- 5 Germany Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 147
- 6 France Macroeconomic Indicators & Light
 Hybrid-Electric Vehicle Supply & Demand 151
- 7 United Kingdom Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 155
- 8 Italy Macroeconomic Indicators & Light
 Hybrid-Electric Vehicle Supply & Demand 159
- 9 Sweden Macroeconomic Indicators & Light
 Hybrid-Electric Vehicle Supply & Demand 162
- 10 Other Western Europe Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 165

ASIA/PACIFIC

- 1 Asia/Pacific Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 169
- 2 Asia/Pacific Light Hybrid-Electric
 Vehicle Demand by Segment & Type 171
- Cht Historical & Potential Light HEV
 Introductions, Asia/Pacific
 Through 2010 172
- 3 Asia/Pacific Light Hybrid-Electric
 Vehicle Supply by Country..... 174
- 4 Asia/Pacific Light Hybrid-Electric
 Vehicle Component Demand 177
- 5 Japan Macroeconomic Indicators & Light
 Hybrid-Electric Vehicle Supply & Demand 182
- 6 China Macroeconomic Indicators & Light
 Hybrid-Electric Vehicle Supply & Demand 187
- 7 South Korea Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 191
- 8 Australia Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 194
- 9 Other Asia/Pacific Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 197

OTHER REGIONS

- 1 Other Regions Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 200
- 2 Other Regions Light Hybrid-Electric
 Vehicle Demand by Segment & Type 202
- 3 Other Regions Light Hybrid-Electric
 Vehicle Supply by Region..... 203
- 4 Other Regions Light Hybrid-Electric
 Vehicle Component Demand 205
- 5 Latin America Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 210
- 6 Eastern Europe Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 214
- 7 Africa/Mideast Macroeconomic
 Indicators & Light Hybrid-Electric
 Vehicle Supply & Demand 218

INDUSTRY STRUCTURE

- Cht World Hybrid-electric Vehicle
 Market Share, 2005..... 222
- Cht Trigger Technology Definition --
 Antilock Brake System Example 226
- Cht Hybrid Vehicle Technologies with Multiple
 Possible Applications 228
 - 1 Selected Cooperative Agreements 236
- Cht OEM Strategic Powerplant Options 244
- Cht Supplier Strategic Powerplant
 Supply Options 247

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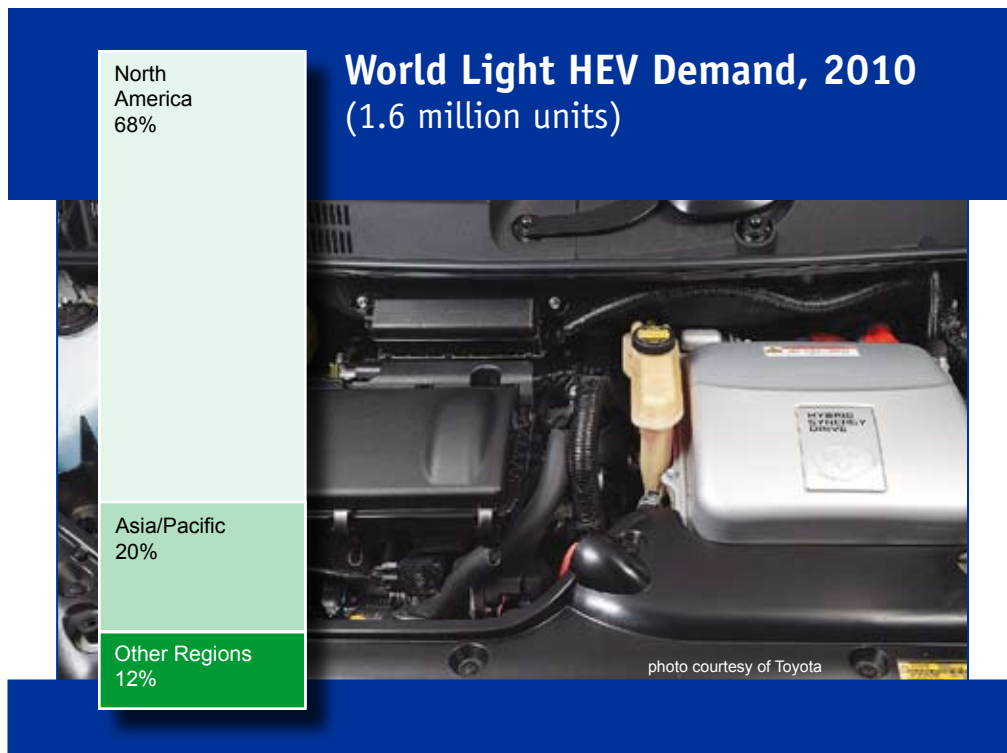
The primary markets for HEVs will remain the Triad countries, although the rapidly growing Chinese market is also expected to exhibit strong demand for these fuel efficient and environmentally friendly vehicles.

HEVs to quickly penetrate world light vehicle market

Worldwide demand for hybrid-electric vehicles (HEVs) will advance rapidly from 1.6 million units in 2010 to 4.3 million units in 2015 and then to nearly double that number by 2020. These fuel efficient and environmentally friendly vehicles are expected to quickly penetrate the world light vehicle market in response to rising energy demand, which in turn has led to erratic fuel prices; and increased emissions regulations worldwide. Cost disparities between HEVs and conventional light vehicles -- currently estimated at between \$1,000 and \$3,000 -- are expected to decline as production volumes increase.

US market to lead gains

Within the Triad countries (i.e., the US, Western Europe and Japan), the US market is expected to experience the highest levels of demand for HEVs, due to erratic fuel costs, the market's unique Corporate Average Fuel Economy requirements, and the lack of significant demand for light vehicle diesels beyond the full-size truck and sport utility vehicle categories. Despite being less cost-effective than internal combustion engine (ICE) vehicles, HEVs have carved out a niche in the US as a "carbon neutral" enabling technology. This niche in part appears to be animated by the extra cost associated with the vehicles, especially regarding HEVs that are both uniquely



styled and focused on delivering superior fuel economy. Demand for HEVs in Europe, where overall light vehicle diesel demand has already reached 50 percent of the total market, is expected to be significantly lower than in the US. Japan will see increased demand for HEVs going forward, as government agencies and allied associations continue to put tax and other incentives in place to stimulate demand. Elsewhere in the Asia/Pacific region, both China and South Korea are expected to be strong HEV markets, due to government interest in dealing with mobile emissions (China), and because local production is planned (both China and South Korea). Other regions of the world will experience lower HEV demand.

Mild hybrids to ultimately predominate industry

Main HEV categories include full hybrids and mild hybrids. Mild hybrids, which include technologies such as "stop/start" systems and belt-driven hybrid assist systems, are expected ultimately to predominate in the industry, as these systems are much easier to quickly integrate into vehicle lines currently in production, and are significantly less expensive than fully integrated full hybrids. The latest wrinkle in HEV technologies involves so-called "plug-in" HEVs, which can provide even greater fuel economy but face commercialization challenges.

Sample Profile & Charts

COMPANY PROFILES

Eaton Corporation

Eaton Center
 1111 Superior Avenue
 Cleveland, OH 44114
 216-523-5000
<http://www.eaton.com>

Sales: \$... total and including elimina
 Geograph... Africa 9%, Europe 18% and
 (Asia/Pac...
 Research... \$287 million (2005)
 Employ...



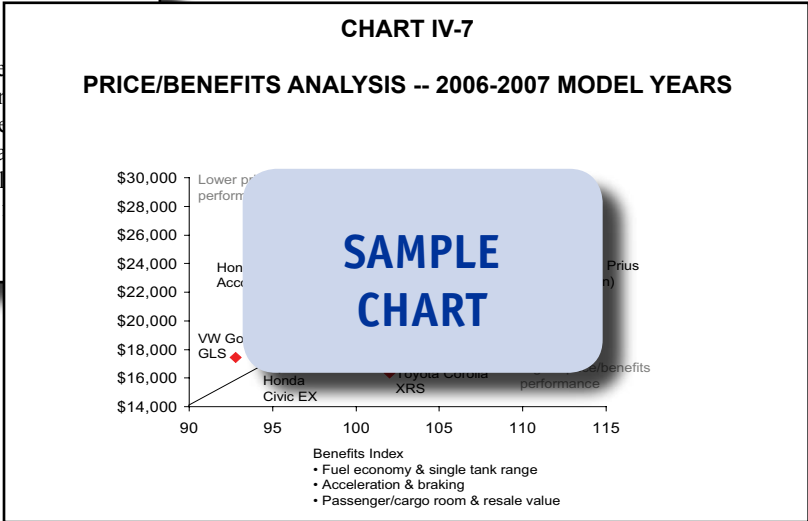
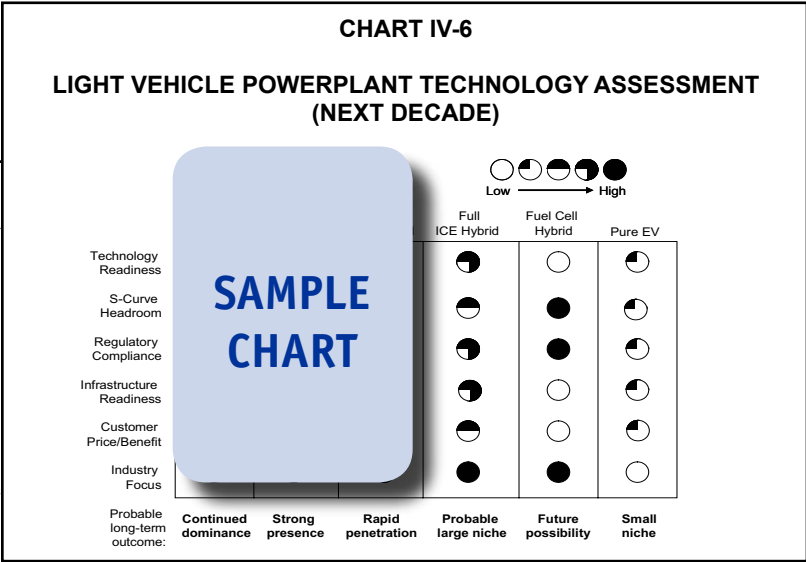
Key Products: a hybrid-electric powertrain and the development of a hydraulic hybrid diesel urban delivery vehicle

Eaton is a global diversified industrial manufacturer. The Company operates in four segments: Automotive, Fluid Power, Electrical and Truck.

The Company participates in the world hybrid vehicles industry through the Truck segment, which had 2005 sales of \$2.3 billion. The segment consists of Eaton's global operations for the development, production and marketing of components and systems for light-, medium- and heavy-duty trucks.

Among Eaton's hybrid vehicle-related activities is the development of a hybrid pick-up and delivery vehicle in collaboration with FedEx Corporation (Memphis, Tennessee), Environmental Defense Fund (New York, New York) and the New York State Energy Research and Development Authority (Albany, New York). Through this all partners are developing hybrid pick-up and delivery vehicles

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Sample Text, Table & Forecast

WESTERN EUROPE

Germany: Light HEV Supply & Demand

Demand for light hybrid-electric vehicles in Germany will be strong in 2015. Demand will be driven by environmentally friendly vehicles in Germany. HEVs compete directly with conventional vehicles in Germany, which continue to make up the majority of the market share. Furthermore, current HEV models, including the Toyota PRIUS, are expected to attract some interested buyers. However, increasing numbers of higher-income consumers are turning to SUVs, as sales of Toyota's upscale GS450H, introduced in mid-2006, are expected to be strong. Toyota also planned to introduce its CAMRY Hybrid in Germany later in 2006.

The Toyota PRIUS HEV was the first hybrid introduced in Germany, in February 2001. It was basically the same car as was introduced in the United States. Toyota has since introduced in Germany the second generation PRIUS, which is reportedly seeing strong demand and long waiting lists. Furthermore, the engineering of the second generation PRIUS was honored by the UKIP Media & Events Automotive Magazines, which awarded the vehicle the best new engine category in the International Engine of the Year 2004 competition. The powerplant later won the 1.4 liter to 1.8 liter engine and best fuel economy categories for 2005. That same year, Honda's INSIGHT won the sub-1 liter category.

PRIUS prices have been somewhat high in Germany compared to the prices of comparable diesel and spark ignition vehicles, which has suppressed demand somewhat. Still, there is a healthy "underground" of hybrid enthusiasts in the country, who actively spot cars on the road and share the latest information regarding HEVs on the Internet, which is helping to spread the word in viral marketing terms. Early PRIUS adopters in Germany (and in Western Europe in general) tend to value the

TABLE VII-5

GERMANY MACROECONOMIC INDICATORS & LIGHT HYBRID-ELECTRIC VEHICLE SUPPLY & DEMAND (000 units)

Item	2000	2005	2010	2015	2020
Population (mil persons)	82.2				
GDP (bil 2000\$)	2074				
GDP/capita	25230				
Households (mil units)	38.1				
vehicle/000 people	43.4				
vehicle/000 households	94				
vehicle/mil \$ GDP	1.72				
Light Vehicle Demand	3565				
percent hybrid	--				
Hybrid Light Vehicle Demand	neg				
net exports & sales from inventory	--				
Hybrid Light Vehicle Production	neg				

SAMPLE
TABLE

"Production of light HEVs in Germany is expected to reach 130,000 units in 2015, as local automakers increase their focus on the technology. Production is expected to include smaller efficiency-focused HEVs such as those planned by Volkswagen and PSA Peugeot Citroën, as well as high-priced luxury and performance-oriented vehicles. For example, in January 2005, DaimlerChrysler unveiled a hybrid version of the MERCEDES-BENZ line-topping S-CLASS sedan. Equipped with a ..."

--Section VII, pg. 146

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OTHER STUDIES

Automotive Repair & Maintenance Services

The US automotive repair and maintenance market will grow over 4% per year, based on a robust do-it-for-me (DIFM) industry gaining market share on the do-it-yourself (DIY) segment. DIFM will benefit from an expanding light vehicle park, increasing complexity of light vehicles, and rising new vehicle prices that stimulate used vehicle purchases and repairs. This study analyzes the US automotive repair and maintenance industry to 2010 and 2015 by provider. It also details market share and profiles major firms.

#2146 01/2007 \$4400

Automotive Aftermarket in North America

The North American automotive aftermarket for light vehicle parts will grow 3.5% annually through 2010. Growth will be driven by an expanding light vehicle park, increasing light vehicle complexity, and rising prices for new cars and light trucks, which stimulate used vehicle purchases. This study analyzes the North American automotive aftermarket parts industry to 2010 and 2015 by product and country. The study also considers market environment factors, estimates company market share and profiles leading players.

#2121 11/2006 \$4400

World Buses

The global market for buses will grow 4.2% annually through 2010. Gains will be driven by rising fuel prices, the establishment of bus rapid transit systems and busways, and limits on private car and motorcycle use in congested and polluted cities. China will remain the largest national market and offer the best growth opportunities. This study analyzes the 286,000-unit world bus industry to 2010 and 2015 by type, world region and for 20 countries. It also evaluates market share and profiles major players.

#2084 08/2006 \$5300

Medium- and Heavy-Duty Truck Aftermarket

The US medium- and heavy-duty (MD/HD) truck aftermarket will rise 3.9% yearly through 2010. New emissions controls—especially those mandated for diesel engines—will provide opportunities, while electronic components will lead gains. In-house service performers will remain dominant, while outsourced providers will also maintain their shares. This study analyzes the \$10 billion US MD/HD truck aftermarket to 2010 and 2015 by product and performer. It also details market share and profiles major players

#2063 05/2006 \$4200

Hybrid Electric Vehicles & Competing Automotive Powerplants

US demand for hybrid-electric and diesel internal combustion engines (ICEs) will grow at double-digit annual rates through 2009 from a small base. Mild hybrid ICEs will grow at a triple-digit rates. Fuel cell powerplants, while promising, must overcome significant barriers to reach the mass market. This study analyzes the 17 million unit (mostly spark ignition) US automotive powerplant industry to 2009 and 2014 by type and market. It also evaluates company market share and profiles leading industry players.

#2025 01/2006 \$4200

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