



Technology indicators for light duty vehicles

Technology indicators that industry is likely to achieve in a mass-market competitive environment.

Standard indicators

Incremental changes in technology with a light weighting focus



		2020	2025	2035
Light Duty Vehicle	Conventional vehicle weight reduction (%)	Baseline	5-10%	20-25%
	xEV vehicle weight reduction (%)	Baseline	10-15%	20-30%

High ambition indicators

Fundamental changes in vehicle architecture and new technology adoption



		2020	2025	2035
Light Duty Vehicle	Conventional vehicle weight reduction (%)	Baseline	10-15%	30-35%
	xEV vehicle weight reduction (%)	Baseline	15-20%	30-40%

Notes:

- Conventional vehicles refer to ICE architecture vehicles
- xEV refers all variants of electrified powertrains, but primarily battery electric
- The % weight reductions are from vehicle masses in 2020
- Increasingly stringent decarbonisation targets have accelerated the light weighting forecasts for conventional vehicles
- Battery pack designs, systems integration and advancing electrified drivelines are seeing increased potential for weight reductions in the next 5-10 years



This roadmap represents a snapshot-in-time view of the global automotive industry propulsion technology forecast for mass market adoption. Specific application-tailored technologies will vary from region to region.



Dark bar:
Technology is in a mass market application. Significant innovation is expected in this time frame



Transition:
Transitions do not mean a phase out from market but a change of R&D emphasis



Dotted line bar:
Market Mature – technology has reached maturity. Likely to remain in mass market until it fades out where it's superseded

