North America Aftermarket Torsional Vibration Dampers Market Forecast to 2028 - COVID-19 Impact and Regional Analysis By Product Design (Viscous Damper, Elastomeric Damper, and Pendulum Damper), Application (On-Highway and Off-Highway), Engine Type (Gasoline Engine and Diesel Engine), and Sales Channel (Original Equipment Supplier and Independent Aftermarket)

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Report description:

The North America aftermarket torsional vibration dampers market is expected to grow from US$ 259.30 million in 2022 to US$ 384.35 million by 2028; it is estimated to register a CAGR of 6.8% from 2021 to 2028.

Torsional vibration dampers absorb rotational vibrations in internal combustion engine vehicles. They were initially introduced to ensure a smoother drive system operation in passenger cars and commercial vehicles. The torsional vibration dampers are combined with decoupled pulleys to keep the crankshaft irregularities away from the belt drive and auxiliaries. Without torsional vibration dampers, vibrations in internal combustion engines would be transmitted through the accessory belt drive system, which may lead to premature failure. Therefore, it is crucial to replace dampers when a harmonic balancer is unable to aid in the reduction of vibrations due to wear. Furthermore, it is also recommended to replace a torsional vibration damper when it has reached the end of its service life.

The absorption of rotational vibrations in internal combustion engines (ICEs) by torsional vibration dampers reduces unwanted noise and enables a more lightweight crankshaft design, eventually extending the life of a motor and enhancing the operational efficiency of vehicles. Countries in North America are highly focused on curbing carbon emissions and improving the fuel efficiency of vehicles on their roads. Heavy-duty vehicle manufacturers find it challenging to mitigate the carbon emission levels of their vehicles. In April 2022, the National Highway Traffic Safety Administration of the US Department of Transportation

announced new fuel economy standards that are expected to enhance the fuel efficiency of automotive vehicles by 8% annually for model years 2024-2025 and 10% for the model year 2026. However, an increase in torsional vibrations is one of the key hindrances in the ongoing development of more efficient combustion engines. Thus, such initiatives from the US government for reducing the consumption of fuel and improving the efficiency of vehicles are triggering the demand for the adoption of torsional vibration dampers in commercial vehicles. Studies are being conducted for developing the optimum design of torsional vibration dampers using the "hybrid damping" approach to decrease the torsional vibrations in the cranktrain system of ICEs. Thus, the growing demand for fuel-efficient vehicles boosts the demand for torsional vibration dampers, thereby propelling the North America aftermarket torsional vibration dampers market growth.

Key Insights:

A surge in the use of next-generation decoupled pulleys is creating lucrative opportunities for North America aftermarket torsional vibration dampers market growth in North America. From 2021, an increase in transportation activities in post-pandemic conditions has triggered the cases of wear and tear of torsional vibration dampers in North America. Moreover, the rise in maritime activities in the US and Canada has further accelerated the demand for torsional vibration dampers in marine engine aftermarkets. The growing need for fuel-efficient vehicles and increasing demand for torsional vibration dampers in agricultural vehicles owing to larger power engines are the factors contributing to the proliferation of North America aftermarket torsional vibration damper market share.

Based on product design, the North America aftermarket torsional vibration dampers market share is segmented into viscous damper, elastomeric damper, and pendulum damper. The viscous damper segment accounted for the largest share of the market in 2021. The market growth of this segment is mainly attributed to the growing demand from the semiconductors and microelectronics industries, among others. The North America aftermarket torsional vibration dampers market for the elastomeric damper segment is projected to grow at the highest CAGR during the forecast period.

North America has a developed automotive industry, mainly, due to the large number of commercial vehicle manufacturers in the region. A rise in environmental concerns and the implementation of stringent laws by various governments to limit emissions by heavy-duty vehicles has catalyzed the demand for heavy-duty aftermarket components. Various technological upgrades have resulted in several innovative approaches for damping vibrations. The rising demand for vehicles with lower fuel consumption, which can be achieved through torsional vibration dampers in ICE vehicles, and the increased need for replacing torsional vibration dampers in agricultural, mining, and recreational sports vehicles are creating significant opportunities for the growth of North America aftermarket torsional vibration dampers market size. The US holds a large share of the North America aftermarket torsional vibration damper market.
Some of the world's largest automotive original equipment suppliers (OES) that supply components for trucks, buses, and other off-highway vehicles are introducing technologically advanced in torsional vibration dampers in North America. Key players in the North America aftermarket torsional vibration damper market focus on expanding their production capabilities and effectively reaching the potential customer base. In January 2020, Bendix Commercial Vehicle Systems LLC planned to transfer the engine vibration damper manufacturing operations from its facility based in North Aurora (Illinois, US) to the Bendix manufacturing campus in Huntington (Indiana, US). Thus, initiatives taken by market players for catering to a larger customer base, alongside the rising demand from off-highway vehicle manufacturers, are anticipated to propel North America aftermarket torsional vibration dampers market size in the coming years.

The report segments the North America aftermarket torsional vibration dampers market as follows:

The North America aftermarket torsional vibration dampers market is segmented on the basis of product design, application,

engine type, and sale channel. Based on product design, the market is categorized into viscous damper, elastomeric damper, and pendulum damper. The North America aftermarket torsional vibration dampers market, by application, is segmented into on-highway and off-highway. In terms of engine type, the market is categorized into gasoline engine and diesel engine. Based on sale channel, the North America aftermarket torsional vibration dampers market is categorized into original equipment supplier (OES) and independent aftermarket (IAM).

Dayco IP Holdings, LLC; GEISLINGER GMBH; BorgWarner Inc.; Continental AG; VIBRACOUSTIC SE; Schaeffler Technologies AG & Co. KG; ZF Friedrichshafen AG; Knorr-Bremse AG; VIBRATECH TVD; and Voith Group are companies operating in the North America aftermarket torsional vibration dampers market.

The overall size of the North America aftermarket torsional vibration dampers market has been derived using both primary and secondary sources. To begin the research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the market. The process also serves the purpose of obtaining an overview and forecast for the market with respect to all the market segments. Multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights into the topic. This process involves VPs, business development managers, market intelligence managers, national sales managers, and external consultants, such as valuation experts, research analysts, and key opinion leaders, specializing in the North America aftermarket torsional vibration dampers market.

Table of Contents:

TABLE OF CONTENTS

North America Aftermarket Torsional Vibration Dampers Market Forecast to 2028 - COVID-19 Impact and Regional Analysis By Product Design (Viscous Damper, Elastomeric Damper, and Pendulum Damper), Application (On-Highway and Off-Highway), Engine Type (Gasoline Engine and Diesel Engine), and Sales Channel (Original Equipment Supplier and Independent Aftermarket)

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