

Automotive Differential Market by Type (Open, Locking, Limited Slip, Electronic Limited Slip, Torque-Vectoring), Drive Type (FWD, RWD, 4WD/AWD), OE Component, On- & Off-Highway Vehicle, Electric Vehicle, Aftermarket & Region - Global Forecast to 2027

Market Report | 2022-11-15 | 311 pages | MarketsandMarkets

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Report description:

The automotive differential market is projected to grow from USD 20.0 billion in 2022 to USD 23.7 billion in 2027 at a CAGR of 3.5%. The factors attributed to the growth of automotive differential are increasing demand for premium vehicles with sophisticated comfort features and excellent driving dynamics offered with RWD and 4WD/AWD options, growing heavy trucks, and multi-axle buses & coaches for intercity travel with different travel experiences. Improving economic conditions and growing requirements of ultimate performance and comfort features primarily drive AWD/4WD systems installation in the premium segment cars and SUVs. These factors would consequently influence the market for multi-wheel drive systems, which would drive the demand for the automotive differential. Additionally, strong demand and upcoming new model launches for plug-in hybrid sedans and SUVs in China, Japan, and European and North American countries are expected to accelerate the differential market growth for the electric and hybrid vehicle segment.

"Passenger cars is the largest market for automotive differentials."

Passenger cars registered the largest market share in the global automotive differential market owing to the rising production of passenger cars in developing countries such as India, China, and Thailand. Further, a drastic preference shift is noted for bigger cars, with doubled SUVs share over the past few years. According to IEA, the number of SUVs on the world's roads increased by more than 35 million in 2021. According to MarketsandMarkets Analysis, of total premium cars produced globally, the share of premium SUVs stood at ~53% in 2016, which grew to ~62% in 2021. US, Canada, China, Japan, and South Korea lead the market for premium SUVs and sedan cars, constituting more than 90% of total production globally.

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Further, almost half of all cars sold in the US and one-third of those sold in Europe are SUVs. Furthermore, with consumers shifting their inclination towards bigger cars with basic and advanced comfort and luxury functionalities, global OEMs are expanding their SUVs and medium and premium cars with either RWD or 4WD/AWD systems. In line with this, the demand for open differential and advanced differentials market would also grow for the passenger cars segment.

"Open Differential hold the largest share in the automotive differential market."

Open differential is the simplest form of differential which transmits the equal torque to each wheel of the two wheels. Most of the passenger cars are front wheel drives installed with open differential due to lower price amongst other types, less energy loss, and less gear configuration used in differential. Asia Pacific holds the largest market share for open differential due to the higher production of passenger cars in this region. Almost 60-65% passenger cars are equipped with open differential type. and it also have wide application in commercial truck and light commercial vehicle. Thus, rise in demand for passenger cars and commercial trucks will create demand for open differentials.

"Differential seals hold the largest share in the automotive differential component aftermarket."

The differential seals are located at the output shafts of a vehicle's differential. They usually seal the axle shafts against the differential and prevent fluid from leaking out of the differential as it operates. Differential seals have maximum and frequent chances of wearing out as compared to other components of a differential system; hence it requires replacement over fixed time intervals. Using damaged seals in the differential may lead to considerable damage to gears, axles, and other differential components owing to oil leakage. It may further damage whole differential assembly. Thus, the high number of seals in differentials and replacement over fixed time intervals creates the demand for differential seals in the aftermarket.

North America is estimated to be the second-largest market for automotive differential

North America accounted to be the second-largest market for automotive differentials. The region has a higher demand for passenger vehicles, particularly premium cars (C segment and above). These premium cars are installed with advanced safety, driving features, and AWD/4WD drive systems. With increasing premium car sales, the region's demand for automotive differentials is expected to grow. The demand for light trucks and vans has witnessed rapid growth in the North American region. Also, there is an increase in demand for second vehicle ownership in the US. It has been observed that most of the second preferred vehicles in the US are light trucks, which are mostly RWD, or 4WD/AWD installed with limited slip differential, ELSD, and Torque vectoring differentials. Lexus, Porche, Toyota, and Audi are offering models installed with advanced differentials. Also, few commercial vehicle manufacturers such as Volvo VNX 300, VNX 400, and VNX 740 are offering heavy trucks and tippers with 4x4, 4x6, etc. configurations. Further, increasing industrialization, growing logistic business and e-commerce industry has created the huge demand for trucks production and sales in the US will subsequently create the demand for automotive differential. In addition to this, hybrid vehicle has also seen a considerable adoption rate in North America. All these factors are expected to drive the market of differentials in the North American region.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and strategy directors, and executives from various key organizations operating in this market.

-□By Company Type: OEMs -10%, and Tier 1 - 90%

-□By Designation: C Level Executives -□ 15%, Directors - 35%, and Others - 50%

-□By Region: Asia Pacific - 50%, Europe - 10%, North America - 30%, and RoW- 10%

GKN Driveline (UK), Eaton Plc (Ireland), American Axle & Manufacturing Company (US), Dana Inc. (US), BorgWarner Inc. (US), Linamar Corporation (Canada), Schaeffler AG (Germany), JTEKT Corporation (Japan), ZF (Germany), Hyundai Wia Corporation (South Korea) are the leading supplier of automotive differential in the global market.

Research Coverage:

The automotive differential market is segmented on differential Type (ICE) (open, locking, limited slip, electronic limited slip, and torque-vectoring differential), drive type (front-wheel drive, rear-wheel drive, and all-wheel drive/4-wheel drive), OE component market (pinion gear, differential housing, side gear, ring gear, and differential bearings), aftermarket by component (differential bearings, differential gears, differential gaskets, and differential seals), electric & hybrid differential by EV type (PHEV, and FCEV),

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electric & hybrid differential market by differential type (open, locking, limited slip, electronic limited slip, and torque-vectoring differential), off-highway differential by equipment type (agricultural tractors, and forklifts) and region (Asia Pacific, Europe, North America, and ROW).

The study also includes an in-depth competitive analysis of the major automotive differential manufacturers in the market, their company profiles, key observations related to product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

The report will help the market leaders in this market with information on the closest approximations of the revenue numbers for the overall automotive differential market and the sub-segments. This report will help differential component manufacturers to understand the OE and aftermarket demand of components. This report would also help stakeholders to understand the fastest growing and largest market for automotive differential at regional and global level. The report helps stakeholders to understand the opportunities in differential OE and aftermarket of components based on the replacement life. This report will help stakeholders to understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

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