Automotive Clutch Market Report by Vehicle Type (Passenger Vehicles, Commercial Vehicles), Transmission Type (Manual Transmission, Automatic Transmission, Automated Manual Transmission (AMT), and Others), Clutch Type (Friction Clutch, Dog Clutch, Hydraulic Clutch, and Others), Clutch Disk/Plate Size (Below 9 Inches, 9 Inches to 10 Inches, 10 Inches to 11 Inches, 11 Inches and Above), Distribution Channel (Aftermarket, OEM), Material Type (Ceramic, Organic, and Others), and Region 2025-2033

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Report description:

The global automotive clutch market size reached USD 13.7 Billion in 2024. Looking forward, the market is expected to reach USD 20.2 Billion by 2033, exhibiting a growth rate (CAGR) of 4.4% during 2025-2033. The increasing demand for commercial and passenger vehicles worldwide, along with stringent emission and fuel economy regulations, are bolstering the market.

An automotive clutch is a mechanical device used in vehicles with manual transmissions to engage and disengage the power transmission between the engine and the gearbox. It comprises several components, including the clutch disc, pressure plate, flywheel, and release bearing, wherein the clutch disc is located between the flywheel of the engine and the transmission input shaft. It is designed to handle high levels of friction and heat generated during operation. It requires periodic maintenance, which includes checking the clutch fluid level and adjusting the clutch pedal play to ensure proper functionality and longevity. It is critical for manual transmission vehicles and provides the driver with control over gear selection and power delivery. It plays a

crucial role in enabling smooth gear shifting and control over the power flow from the engine to the wheels.

At present, there is a rise in the demand for passenger and commercial vehicles worldwide. In addition, rapid urbanization and improving the living standards of individuals are positively influencing the sales of vehicles, both for personal and commercial use. Moreover, the increasing production and sales of vehicles, particularly those equipped with manual transmissions, are propelling the growth of the market. Besides this, clutches are vital components in heavy-duty vehicles that require robust and efficient power transmission systems. The growth in e-commerce, logistics, and transportation services is fueling the demand for commercial vehicles, consequently catalyzing the requirement for clutches. Apart from this, the automotive industry is witnessing continuous advancements in clutch technologies to enhance performance, efficiency, and durability. Manufacturers are also developing innovative clutch systems, such as dual-clutch transmissions (DCT) and automated manual transmissions (AMT), to combine the advantages of manual and automatic transmissions.

Automotive Clutch Market Trends/Drivers:
Growing demand for fuel efficiency is positively influencing the market

The increasing focus on fuel efficiency and reducing carbon emissions is leading to the development of technologies aimed at improving vehicle efficiency. Clutches play a crucial role in optimizing power transmission and improving fuel economy. Manufacturers are continuously working on advanced clutch systems, such as lightweight clutches and low-drag designs, to enhance fuel efficiency, thereby driving the demand for automotive clutches. They are also developing dual-clutch transmissions (DCTs), as they can provide quick and seamless gear changes, resulting in better fuel economy as compared to traditional automatic transmissions. Moreover, automotive clutches designed specifically for start-stop systems are optimized for quick engagement and disengagement, which minimizes fuel consumption during frequent stop-and-go driving conditions.

Stringent emission and fuel economy regulations propelling market growth

Governing agencies of various countries are implementing stringent regulations to reduce vehicle emissions and improve fuel economy. These regulations push automakers to adopt technologies that enhance fuel efficiency, such as start-stop systems and hybrid powertrains. Clutches are essential components in these systems, enabling smooth engine start-stop functionality and efficient power transfer. To meet stricter emission standards, automakers are adopting downsized engines with turbocharging technology, which can be mitigated by using clutches. Clutches help manage power delivery and optimize engine performance, making them essential for turbocharged engines. Moreover, stringent emission and fuel economy regulations are encouraging automakers to adopt technologies like downsized engines, start-stop systems, hybrid powertrains, and lightweight designs.

Technological advancements in electric vehicles (EVs) stimulating market growth

The rapid growth of electric vehicles (EVs) is impacting the market. Clutches are utilized in EVs to enable functions like power transfer between electric motors and internal combustion engines and seamless shifting in hybrid powertrains. Moreover, these vehicles rely on clutches to connect and disconnect the internal combustion engine from the electric motor to optimize powertrain efficiency. They also have clutches in their drivetrains to control power distribution and regenerative braking for enhancing overall efficiency. As the adoption of EVs and hybrid vehicles continues to rise, the demand for specialized clutches for these applications is increasing around the world.

Automotive Clutch Industry Segmentation:
IMARC Group provides an analysis of the key trends in each segment of the market, along with the market forecast at the global, and regional levels for 2025-2033. Our report has categorized the market based on the vehicle type, transmission type, clutch type, clutch disk/plate size, distribution channel, and material type.

Breakup by Vehicle Type:
-Passenger Vehicles
-Commercial Vehicles

Passenger vehicles dominate the market

The report has provided a detailed breakup and analysis of the market based on the vehicle type. This includes passenger vehicles and commercial vehicles. According to the report, passenger vehicles represented the largest segment.

Passenger vehicles, also known as cars or automobiles, are motor vehicles designed primarily for the transportation of people. They are designed to carry a small number of passengers, typically up to eight individuals, including the driver. They are widely used for personal transportation, commuting, and family travel.

Commercial vehicles are motor vehicles that are primarily used for commercial purposes rather than personal transportation. These vehicles are involved in various business activities and typically used to transport goods, services, or passengers for financial gain. They are often subject to different regulations, licensing requirements, and operational restrictions compared to passenger vehicles.

Breakup by Transmission Type:

-Manual Transmission
-Automatic Transmission
-Automated Manual Transmission (AMT)
-Others

Manual transmission holds the biggest market share

A detailed breakup and analysis of the market based on the transmission type has also been provided in the report. This includes manual transmission, automatic transmission, automated manual transmission (AMT), and others. According to the report, manual transmission accounted for the largest market share.

A manual transmission, also known as a manual gearbox or standard transmission, is a type of transmission system used in vehicles to change gears manually by the driver. It requires the driver to physically engage and disengage the gears using a clutch pedal and a shift lever or gear selector.

Automatic transmission is a type of gearbox or transmission system used in vehicles to change gears automatically, without the need for manual shifting by the driver. It is designed to provide a smooth and convenient driving experience by automatically selecting the appropriate gear ratio based on the speed, load, and other driving conditions of the vehicle.

Breakup by Clutch Type:

-Friction Clutch
-Dog Clutch
-Hydraulic Clutch
-Others

Friction clutch accounts for the majority of the market share

A detailed breakup and analysis of the market based on the clutch type has also been provided in the report. This includes friction clutch, dog clutch, hydraulic clutch, and others. According to the report, friction clutch accounted for the largest market share.

A friction clutch is a mechanical device used to engage and disengage the power transmission between two rotating shafts. It is commonly found in vehicles with manual transmissions, motorcycles, and various industrial machinery. The basic principle of a friction clutch involves using frictional forces to connect or disconnect the input and output shafts. It allows for smooth starts, gear changes, and controlled power delivery. The clutch system typically consists of a clutch plate, also known as a friction disc, pressure plate, flywheel, and release mechanism.

Breakup by Clutch Disk/Plate Size:

- Below 9 Inches
- 9 Inches to 10 Inches
- 10 Inches to 11 Inches
- 11 Inches and Above

Below 9 inches represent the largest market share

A detailed breakup and analysis of the market based on the clutch disk/plate size has also been provided in the report. This includes below 9 inches, 9 inches to 10 inches, 10 inches to 11 inches, and 11 inches and above. According to the report, below 9 inches accounted for the largest market share.

Clutch disks with sizes below 9 inches are typically used in smaller vehicles and machinery wherein space and power requirements are limited. These vehicles require smaller, lightweight clutches to transmit power from the engine to the transmission efficiently. In addition, certain light-duty trucks, such as pickup trucks and delivery vans, employ clutch disks below 9 inches in size, as they have lower power requirements compared to heavy-duty trucks and can use smaller clutches.

Breakup by Distribution Channel:

- Aftermarket
- OEM

OEM holds the largest market share

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes aftermarket and OEM. According to the report, OEM accounted for the largest market share.

Advancements in clutch technologies can influence sales through original equipment manufacturers (OEMs). They are continuously working on improving clutch performance, durability, and efficiency. New technologies like dual-clutch transmissions and automated manual transmissions may impact the demand for clutches in certain vehicle segments. Moreover, the introduction of new vehicle models or updates to existing models can drive the sales of automotive clutches through OEMs. Different vehicle types, such as passenger cars, commercial vehicles, and off-road vehicles, require different types of clutches, leading to varying demand based on market trends.

Breakup by Material Type:

-Ceramic
-Organic
-Others

Ceramic accounts for the biggest market share

A detailed breakup and analysis of the market based on the material type has also been provided in the report. This includes ceramic, organic, and others. According to the report, ceramic accounted for the largest market share.

Ceramic is a commonly preferred material for manufacturing automotive clutches, as they can withstand high temperatures without losing their mechanical properties. It also has enhanced wear resistance, which is crucial for clutch components that experience repeated frictional contact. The high durability of ceramic materials allows them to maintain their shape and performance for a longer duration compared to other materials. It offers a high friction coefficient, which means it can provide a strong grip and transfer torque efficiently during clutch engagement.

Breakup by Region:

-Asia Pacific
-Europe
-North America
-Middle East and Africa
-Latin America

Asia Pacific exhibits a clear dominance, accounting for the largest market share

The report has also provided a comprehensive analysis of all the major regional markets, which include Asia Pacific, Europe, North America, Middle East and Africa, and Latin America.

Asia Pacific held the biggest market share due to rising disposable incomes, urbanization, and increasing demand for passenger and commercial vehicles. Moreover, there is a rise in the sales of vehicles in numerous countries. The continuous growth in vehicle ownership and usage is catalyzing the demand for automotive clutches for replacement purposes and as original equipment in new vehicles.

Competitive Landscape:
Key players in the industry are developing advanced clutch technologies, such as self-adjusting clutch for passenger cars. They are also focusing on the development of hybrid and electric vehicle clutch systems to cater to the evolving automotive industry. Moreover, top manufacturers are working on the development of dual-clutch transmission systems, which provide smoother gear shifts and improved fuel efficiency. They are also investing in research and development (R&D) activities to improve the friction materials used in their clutches, resulting in enhanced performance and extended service life. Additionally, key market players are improving clutch performance, reducing weight, and enhancing overall efficiency through innovations in materials and designs.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

-Aisin Seiki Co., Ltd.
-Magneti Marelli S.p.A.

-Schaeffler Group AG & Co.
-ZF Friedrichshafen AG,
-BorgWarner Inc.
-Valeo
-Eaton Corporation Inc.
-WABCO Holdings Inc.
-EXEDY Corporation
-F.C.C. Co. Ltd.
-NSK Ltd
-AMS Automotive LLC
-APLS Automotive Industries Pvt. Ltd.
-JATCO Ltd.
-Allison Transmission Inc.
-FTE automotive GmbH

Key Questions Answered in This Report
1.What was the size of the global automotive clutch market in 2024?
2.What is the expected growth rate of the global automotive clutch market during 2025-2033?
3.What are the key factors driving the global automotive clutch market?
4.What has been the impact of COVID-19 on the global automotive clutch market?
5.What is the breakup of the global automotive clutch market based on the vehicle type?
6.What is the breakup of the global automotive clutch market based on the transmission type?
7.What is the breakup of the global automotive clutch market based on the clutch type?
8.What is the breakup of the global automotive clutch market based on the clutch disk/plate size?
9.What is the breakup of the global automotive clutch market based on the distribution channel?
10.What is the breakup of the global automotive clutch market based on the material type?
11.What are the key regions in the global automotive clutch market?
12.Who are the key players/companies in the global automotive clutch market?

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