

Automotive Winches System (AWS) Market Assessment, By Product [Hydraulic Winches, Electric Winches, Others], By Function [Automatic, Manual], By Vehicle Type [Passenger Vehicle, Commercial Vehicle], By Rope Type [Steel Rope, Synthetic Rope, Others], By Load Capacity [Light Duty, Medium Duty, Heavy Duty], By Region, Opportunities and Forecast, 2017-2031F

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Abstracts

Automotive winches system (AWS) market is projected to witness a CAGR of 7.04% during the forecast period 2024-2031, growing from USD 20.11 billion in 2023 to USD 34.66 billion in 2031. Automotive winches systems are one of the fastest growing and most innovative automotive markets in the world. It is crucial in serving different applications, such as off-road vehicles (ORVs), construction, agriculture, and towing. Vehicle winch systems include electric, hydraulic, and mechanical winches. Moreover, they are used for heavy-duty recovery (HDR) and recreational off-road (ROR) missions. Winch systems have become more efficient and user-friendly due to the use of advanced technologies like wireless remote control and load-sensing, as well as synthetic rope materials. Apart from the advancements, the market expands its boundaries with the high demand for ORVs for wild expeditions and exploration of different terrains. While the winches technology has evolved over the years, the core usage has remained the same involving activities such as construction, towing, and rescuing, among others. For example, the wireless remote-control systems now help operate a winch from a safe distance.

Load Sensing Technology and Synthetic Rope to Make Winches System Work Smarter

The market grows with different factors, including rapid technological milestones that the manufacturers have achieved over the years. Some winches are now equipped with load sensing technology, which automatically modulates the power and speed of the winch depending on the load. This helps avoid overloading and damage of the winch or the vehicle. The technology allows the winch to operate at maximum efficiency for the load. For example, a light load will allow the winch to run faster, thus saving time. On the other hand, a heavy load will require the winch to work at a slower rate, thereby reducing the time needed for recovery.

Synthetic ropes are becoming increasingly popular due to their advantages over steel cables, such as lightweight, less energy-dense, and easier to manage. Additionally, they are less susceptible to rust and corrosion. Manufacturers are creating winches that are smaller and lighter, allowing them to be installed on a wider variety of vehicles. This sort of design is also helping the end users to easily mount the winch on their vehicle.

Increased Construction Activities to Cater Market Growth

Winches play an essential role in the transportation, positioning, and lifting of heavy equipment and materials in construction and industrial processes. The emerging economies are witnessing a rise in construction and industrial activities such as urban projects, housing infrastructure, and commercial building. Industrial activity is on the rise in developing countries as they seek to diversify their national economies away from traditional agricultural and resource-based sectors. The governments of these developing countries often have strategies in place to attract inward investment and stimulate local manufacturing industries. Consequently, the need for winches increases with the growth of construction and industrial activities, thereby booming the automotive winches system (AWS) market growth. This also signifies more competition between manufacturers and a wider variety of winch options. In addition, the advent of various product innovations based on different lifting needs of the industry are positively influencing the market growth.

In August 2023, the Bushranger 4x4 Gear released information about its new Covert range. This new model replaces the traditional external control box, providing owners with a more versatile and inconspicuous fitment option. The Covert range is powered by an Australian-engineered 12-volt motor with a 4-stage gearbox, providing a maximum power output of 5.3h (3950W). This unit is ideal for vehicles running on a single battery, allowing for faster line speeds and a lower current draw.

Government Infrastructure Investments Propel AWS Market Growth

Governments spend much money on road construction, bridge construction, and other public works projects. Since winch systems are often used in construction and transport, these projects indirectly help the AWS market. Winch systems are commonly utilized in search and rescue (SAR) operations by government agencies, including fire departments, coast guards, and other rescue and recovery organizations. Agricultural and forestry industry utilize winch systems for a variety of purposes, including logging and hauling, as well as land management. Winch systems can be encouraged to be adopted by government initiatives in support of automotive winch systems (AWS) sector. Government support and initiatives in this field can have a positive impact on the winch systems market. Other government programs, such as habitat restoration, wildlife monitoring, and land reclamation, require vehicles with winch systems to carry out activities. These activities involve tree planting, wildlife monitoring equipment installation, and ecosystem restoration. Government defense projects also consume a big chunk of the automotive winches system market.

In September 2023, India's Ministry of Defence launched an initiative to procure 170 tracked ARVs, which will be essential for the Indian Army's operational readiness, particularly in difficult terrain and inclement weather conditions. The ARVs are expected to have the necessary recovery tools, including winch, crane, dozer, and specialized maintenance tools. These many government-based projects help the market in expanding its range. Though, projects like energy and utilities, mining and extraction, and port & harbour spaces are also consuming a major chunk from the market.

Easy Installation, Precise Control, and Lower Maintenance Provide Electric Winches an Edge

Based on product type, electrical winches are typically simpler to set up and require less complicated plumbing and hydraulic lines than hydraulic winches and are often regarded as more user-friendly. Electrical winches consume less energy than hydraulic systems since they draw power only when in use. Hydraulic systems, on the other hand, consume energy continuously due to the continuous operation of the hydraulic pump, even when winches are not in use. Furthermore, the lower maintenance of electric winches systems is acting as another factor promoting the higher consumption of this segment.

In October 2023, TWG (a part of Dover Corporation) introduced the new dp EL22 Electric Winch with 22,000 lb for line-pull. The EL22 has a military-grade, high-

performance, four-stage planetary geometry for rugged performance and durability. The DC motor can deliver up to three times the duty cycle of the competition.

Off-Roading Sports and Self-Recovery Application to Garner Passenger Vehicle Segment

Based on application, passenger vehicles will likely hold the major portion of the AWS market. All-terrain vehicles (ATVs), utility terrain vehicles (UTVs), and other types of passenger vehicles have had a considerable impact on the automotive winch system (AWS) market. Winch systems offer an additional layer of protection for off-road enthusiasts by allowing them to self-rescue. When operating in remote and difficult terrain, the ability to extricate a stranded vehicle is an essential safety feature. This is why many ATVs and UTVs owner adopt the automotive winches system (AWS). These systems also provide an option for passenger vehicle to access remote areas as AWS helps vehicles in their self-recovery.

In August 2023, Nissan Australia issued a recall of 210 Navara models for the 2021-2023 model year due to a malfunctioning winch. The manufacturer provided customers with the option to arrange an appointment to have a remote and receiver replaced.

Wide Off-Roading Terrains and Commercial Usage Makes North America the Leading Region

The North American automotive winches systems (AWS) market has experienced a surge in demand due to the region's robust off-road and recreational vehicle (RV) culture. Off-road enthusiasts often necessitate winches for their off-road recovery activities and outdoor adventures. The North American market for pick-up trucks and sport utility vehicles (SUVs) is largely composed of vehicles that are typically equipped with a winch system or are compatible with a winch. As a result, many North American consumers are looking for vehicles that offer off-road and towing capabilities, resulting in an increased demand for AWS.

Winch systems are not only used for recreational purposes but are also extensively applied in the region for various commercial and industrial purposes. This includes the construction, farming, towing and transportation sectors, which require winches to load and unload heavy equipment. Lastly, different types of terrain and weather conditions on the continent require durable and reliable winch systems, thereby positively impacting the market growth.

Impact of COVID-19

The global repercussions of the COVID-19 pandemic significantly disrupted supply chains, causing delays and shortages in winch component availability. Factory closures, movement restrictions, and workforce shortages in manufacturing centers led to decreased winch system production capacity. Lockdowns and security measures compelled the temporary shutdown or halt in production of many manufacturing facilities. Consequently, the demand for AWS suffered as numerous building and infrastructure projects were either postponed or cancelled due to the pandemic's widespread impact on global economic activities.

Impact of Russia-Ukraine War

The Russia-Ukraine war had an adverse impact on automotive sector. It damaged the market's functionality in Russia, Ukraine, and other East European regions. Factors like increased production costs, supply chain disruptions, and export and import restriction limited the market growth. The off-road and RVs market, which rely heavily on winch systems, were also impacted as the war affected global trade and consumer confidence. Some automotive winches system (AWS) manufacturers may have manufacturing locations or service providers in the affected area. Damages to these locations had direct effect on production and availability.

Key Players Landscape and Outlook

The automotive winch systems (AWS) market is dominated by a few major players, each providing various winch solutions for different applications and sectors. These players compete based on product quality, innovation and technology, distribution, pricing, and customer support. Brands also add female-focused services and customer loyalty programs to their marketing strategy. Furthermore, key players collaborate, acquire, and partner for extended supply chain and distribution channel.

In July 2023, the Warn 95950 Zeon 12-S was awarded as the best overall by Forbes in their Best 4x4 Off-Road Winches for 2023. The Zeon range has a tow rating of 12,000 pounds and features unavailable on many of its competitors. The number 12 on the Zeon line indicates the 12,000-pound rating, while the number S indicates the lightweight version of the Zeon line.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work

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