

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

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Abstracts

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.

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,

Automotive Differential Market by Type (Open, Locking, Limited Slip, Electronic Limited Slip, Torque-Vectoring...

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), 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.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 INCLUSIONS & EXCLUSIONS

TABLE 1 AUTOMOTIVE DIFFERENTIAL MARKET: INCLUSIONS & EXCLUSIONS

1.4 MARKET SCOPE

1.4.1 MARKETS COVERED

FIGURE 1 AUTOMOTIVE DIFFERENTIAL MARKET SEGMENTATION

1.4.2 YEARS CONSIDERED

1.5 CURRENCY CONSIDERED

1.6 SUMMARY OF CHANGES

1.7 LIMITATIONS

1.8 STAKEHOLDERS

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 RESEARCH DESIGN – AUTOMOTIVE DIFFERENTIAL MARKET

FIGURE 3 RESEARCH METHODOLOGY MODEL

2.1.1 SECONDARY DATA

2.1.1.1 Key secondary sources for vehicle production and electric vehicle sales

2.1.1.2 Key secondary sources for market sizing

2.1.1.3 Key data from secondary sources

2.1.2 PRIMARY DATA

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS

2.1.2.1 Sampling techniques & data collection methods

2.1.2.2 Primary participants

2.2 MARKET SIZE ESTIMATION

FIGURE 5 RESEARCH METHODOLOGY: HYPOTHESIS BUILDING

2.2.1 BOTTOM-UP APPROACH

FIGURE 6 AUTOMOTIVE DIFFERENTIAL MARKET: BOTTOM-UP APPROACH

2.2.2 FACTOR ANALYSIS FOR MARKET SIZING: DEMAND AND SUPPLY SIDES

2.3 MARKET BREAKDOWN & DATA TRIANGULATION

2.4 FACTOR ANALYSIS

2.5 ASSUMPTIONS AND ASSOCIATED RISKS

2.5.1 RESEARCH ASSUMPTIONS

2.5.2 MARKET ASSUMPTIONS

TABLE 2 ASSUMPTIONS, ASSOCIATED RISKS, AND IMPACT

2.6 LIMITATIONS

3 EXECUTIVE SUMMARY

FIGURE 7 AUTOMOTIVE DIFFERENTIAL MARKET: MARKET OUTLOOK

FIGURE 8 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION, 2022 VS. 2027
(USD MILLION)

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN AUTOMOTIVE
DIFFERENTIAL MARKET

FIGURE 9 INCREASE IN DEMAND FOR SUV AND LUXURY VEHICLES TO DRIVE
AUTOMOTIVE DIFFERENTIAL MARKET

4.2 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION (ICE)

FIGURE 10 ASIA PACIFIC TO DOMINATE AUTOMOTIVE DIFFERENTIAL MARKET

4.3 AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE (ICE)

FIGURE 11 OPEN DIFFERENTIALS SEGMENT TO ACCOUNT FOR LARGEST
MARKET SHARE

4.4 AUTOMOTIVE DIFFERENTIAL MARKET, BY DRIVE TYPE (ICE)

FIGURE 12 AWD/4WD DRIVE SEGMENT TO HOLD LARGEST MARKET SHARE
DURING FORECAST PERIOD

4.5 AUTOMOTIVE DIFFERENTIAL MARKET, BY VEHICLE TYPE (ICE)

FIGURE 13 PASSENGER CARS SEGMENT TO DOMINATE DURING FORECAST
PERIOD

4.6 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE

FIGURE 14 PHEV SEGMENT TO BE LARGEST MARKET

4.7 ELECTRIC & HYBRID DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE

FIGURE 15 ELSD SEGMENT TO RECORD HIGHEST CAGR DURING FORECAST
PERIOD

4.8 AUTOMOTIVE DIFFERENTIAL OE MARKET, BY COMPONENT (ICE)

FIGURE 16 PINION GEARS SEGMENT TO HOLD LARGEST MARKET SHARE
DURING FORECAST PERIOD

4.9 AUTOMOTIVE DIFFERENTIAL AFTERMARKET, BY COMPONENT (ICE)

FIGURE 17 DIFFERENTIAL BEARINGS TO DOMINATE MARKET DURING
FORECAST PERIOD

4.10 AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY DRIVE TYPE (ICE)

FIGURE 18 2WD DRIVE TRACTORS TO HOLD LARGEST MARKET SHARE DURING FORECAST PERIOD

4.11 OFF-HIGHWAY DIFFERENTIAL MARKET, BY EQUIPMENT TYPE (ICE)

FIGURE 19 AGRICULTURAL TRACTORS TO ACCOUNT FOR LARGER MARKET SHARE DURING FORECAST PERIOD

4.12 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION (ICE)

FIGURE 20 ASIA PACIFIC TO LEAD MARKET DURING FORECAST PERIOD

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 21 AUTOMOTIVE DIFFERENTIAL MARKET: MARKET DYNAMICS

5.2.1 DRIVERS

5.2.1.1 Rising demand for commercial and heavy-duty vehicles

FIGURE 22 HEAVY TRUCKS PRODUCTION, 2018–2021 (UNITS)

5.2.1.2 Increased investment in infrastructure to boost demand for construction & mining equipment

FIGURE 23 CONSTRUCTION EQUIPMENT SALES, 2018–2025 (UNITS)

FIGURE 24 MINING EQUIPMENT SALES, 2018–2025 (UNITS)

5.2.1.3 Growing penetration of all-wheel drive (AWD) and four-wheel drive (4WD) vehicles

FIGURE 25 LCV: DRIVETRAIN INSTALLATION RATE (BY DRIVE TYPE), 2014–2021

FIGURE 26 HCV: DRIVETRAIN INSTALLATION RATE (BY DRIVE TYPE), 2014–2021

5.2.1.4 Rising preference for luxury vehicles and SUVs

TABLE 3 KEY OEMS OFFERING SUVs WITH AWD & 4WD SYSTEMS

5.2.2 RESTRAINTS

5.2.2.1 Growing demand for electric passenger and commercial vehicles

5.2.3 OPPORTUNITIES

5.2.3.1 Advancements in differential technology

5.2.4 CHALLENGES

5.2.4.1 Presence of local and regional suppliers

5.3 TRENDS/DISRUPTIONS IMPACTING BUYERS

FIGURE 27 TRENDS/DISRUPTIONS IMPACTING BUYERS

5.4 AUTOMOTIVE DIFFERENTIAL MARKET SCENARIO

FIGURE 28 AUTOMOTIVE DIFFERENTIAL MARKET SCENARIO, 2018–2027 (USD MILLION)

5.4.1 REALISTIC SCENARIO

TABLE 4 AUTOMOTIVE DIFFERENTIAL MARKET (REALISTIC SCENARIO), BY

REGION, 2018–2027 (USD MILLION)

5.4.2 LOW IMPACT SCENARIO

TABLE 5 AUTOMOTIVE DIFFERENTIAL MARKET (LOW IMPACT SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.4.3 HIGH IMPACT SCENARIO

TABLE 6 AUTOMOTIVE DIFFERENTIAL MARKET (HIGH IMPACT SCENARIO), BY REGION, 2018–2027 (USD MILLION)

5.5 PORTER'S FIVE FORCES ANALYSIS

FIGURE 29 PORTER'S FIVE FORCES ANALYSIS: ESTABLISHED GLOBAL PLAYERS INCREASE COMPETITION

5.5.1 PORTER'S FIVE FORCES ANALYSIS

5.5.2 THREAT OF SUBSTITUTES

5.5.3 THREAT OF NEW ENTRANTS

5.5.4 BARGAINING POWER OF BUYERS

5.5.5 BARGAINING POWER OF SUPPLIERS

5.5.6 INTENSITY OF COMPETITIVE RIVALRY

5.6 AUTOMOTIVE DIFFERENTIAL ECOSYSTEM

FIGURE 30 AUTOMOTIVE DIFFERENTIAL MARKET ECOSYSTEM

TABLE 7 AUTOMOTIVE DIFFERENTIAL MARKET: ROLE OF COMPANIES IN ECOSYSTEM

5.7 SUPPLY CHAIN ANALYSIS

FIGURE 31 SUPPLY CHAIN ANALYSIS: AUTOMOTIVE DIFFERENTIAL MARKET

5.8 PRICING ANALYSIS

5.8.1 BY TYPE AND REGION (USD/UNIT), 2021

5.9 CASE STUDY ANALYSIS

5.9.1 GKN AUTOMOTIVE AND PORSCHE ENGINEERING DEVELOP NEW METAL AM FOR E-DRIVE APPLICATION

5.9.2 GKN AUTOMOTIVE AND ROMAX CONSULTING DESIGN HIGH-EFFICIENCY E-DRIVE SYSTEM

5.10 IMPORT & EXPORT DATA

5.10.1 IMPORT DATA

5.10.1.1 US

TABLE 8 US: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.2 Mexico

TABLE 9 MEXICO: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.3 China

TABLE 10 CHINA: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.4 Japan

TABLE 11 JAPAN: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.5 India

TABLE 12 INDIA: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.6 Germany

TABLE 13 GERMANY: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.7 France

TABLE 14 FRANCE: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.1.8 Spain

TABLE 15 SPAIN: DIFFERENTIAL IMPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2 EXPORT DATA

5.10.2.1 US

TABLE 16 US: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.2 Mexico

TABLE 17 MEXICO: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.3 China

TABLE 18 CHINA: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.4 Japan

TABLE 19 JAPAN: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.5 India

TABLE 20 INDIA: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.6 Germany

TABLE 21 GERMANY: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.7 France

TABLE 22 FRANCE: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.10.2.8 Spain

TABLE 23 SPAIN: DIFFERENTIAL EXPORTS SHARE, BY COUNTRY (VALUE %)

5.11 KEY CONFERENCES AND EVENTS, 2022–2023

5.11.1 AUTOMOTIVE DIFFERENTIAL MARKET: UPCOMING CONFERENCES AND EVENTS

5.12 PATENT ANALYSIS

5.12.1 APPLICATIONS AND PATENTS GRANTED, 2019–2022

5.13 BUYING CRITERIA

FIGURE 32 KEY BUYING CRITERIA FOR ICE AND ELECTRIC & HYBRID VEHICLES

TABLE 24 KEY BUYING CRITERIA FOR ICE AND ELECTRIC & HYBRID VEHICLES

5.14 REGULATORY ANALYSIS

TABLE 25 DIFFERENTIAL/4WD/AWD REGULATIONS, BY REGION

5.14.1 EMISSION REGULATIONS

5.14.1.1 On-road vehicles

TABLE 26 EURO-5 VS. EURO-6 VEHICLE EMISSION STANDARDS FOR NEW EUROPEAN DRIVING CYCLE

TABLE 27 ON-ROAD VEHICLE EMISSION REGULATION OUTLOOK FOR PASSENGER CARS, 2016–2021

5.15 TECHNOLOGY ANALYSIS

5.15.1 DEVELOPMENT OF ELECTRONIC DIFFERENTIALS FOR ELECTRIC VEHICLES

5.15.2 DEVELOPMENT OF ELECTRONICALLY ACTIVATED CLUTCHES TO COMPRESS PLATES AND LOCK DIFFERENTIAL

6 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DIFFERENTIAL TYPE

6.1 INTRODUCTION

6.1.1 RESEARCH METHODOLOGY

6.1.2 ASSUMPTIONS

6.1.3 INDUSTRY INSIGHTS: ICE VEHICLES, BY DIFFERENTIAL TYPE

FIGURE 33 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DIFFERENTIAL TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 28 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 29 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 30 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 31 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

6.2 ELECTRONIC LIMITED SLIP DIFFERENTIALS

TABLE 32 ELSD MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 33 ELSD MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 34 ELSD MARKET, BY REGION, 2018–2021 (MILLION USD)

TABLE 35 ELSD MARKET, BY REGION, 2022–2027 (MILLION USD)

6.3 LOCKING DIFFERENTIALS

TABLE 36 LOCKING DIFFERENTIALS MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 37 LOCKING DIFFERENTIALS MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 38 LOCKING DIFFERENTIALS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 39 LOCKING DIFFERENTIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

6.4 LIMITED SLIP DIFFERENTIALS

TABLE 40 LIMITED SLIP DIFFERENTIALS MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 41 LIMITED SLIP DIFFERENTIALS MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 42 LIMITED SLIP DIFFERENTIALS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 43 LIMITED SLIP DIFFERENTIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

6.5 OPEN DIFFERENTIALS

TABLE 44 OPEN DIFFERENTIALS MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 45 OPEN DIFFERENTIALS MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 46 OPEN DIFFERENTIALS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 47 OPEN DIFFERENTIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

6.6 TORQUE VECTORING DIFFERENTIALS

TABLE 48 TORQUE VECTORING DIFFERENTIALS MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 49 TORQUE VECTORING DIFFERENTIALS MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 50 TORQUE VECTORING DIFFERENTIALS MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 51 TORQUE VECTORING DIFFERENTIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DRIVE TYPE

7.1 INTRODUCTION

7.1.1 RESEARCH METHODOLOGY

7.1.2 ASSUMPTIONS

7.1.3 INDUSTRY INSIGHTS: ICE VEHICLES, BY DRIVE TYPE

FIGURE 34 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DRIVE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 52 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DRIVE TYPE, 2018–2021 ('000 UNITS)

TABLE 53 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DRIVE TYPE, 2022–2027 ('000 UNITS)

TABLE 54 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DRIVE TYPE, 2018–2021 (USD MILLION)

TABLE 55 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY DRIVE TYPE,
2022–2027 (USD MILLION)

7.2 FRONT-WHEEL DRIVE

TABLE 56 FWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2018–2021 ('000 UNITS)

TABLE 57 FWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2022–2027 ('000 UNITS)

TABLE 58 FWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2018–2021 (USD MILLION)

TABLE 59 FWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2022–2027 (USD MILLION)

7.3 REAR-WHEEL DRIVE

TABLE 60 RWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2018–2021 ('000 UNITS)

TABLE 61 RWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2022–2027 ('000 UNITS)

TABLE 62 RWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2018–2021 (USD MILLION)

TABLE 63 RWD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2022–2027 (USD MILLION)

7.4 ALL-WHEEL DRIVE/FOUR-WHEEL DRIVE (AWD/4WD)

TABLE 64 AWD/4WD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2018–2021 ('000 UNITS)

TABLE 65 AWD/4WD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2022–2027 ('000 UNITS)

TABLE 66 AWD/4WD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2018–2021 (USD MILLION)

TABLE 67 AWD/4WD: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION,
2022–2027 (USD MILLION)

8 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY VEHICLE TYPE

8.1 INTRODUCTION

8.1.1 RESEARCH METHODOLOGY

8.1.2 ASSUMPTIONS

8.1.3 INDUSTRY INSIGHTS: BY VEHICLE TYPE (ICE)

FIGURE 35 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY VEHICLE TYPE, 2022
VS. 2027 (USD MILLION)

TABLE 68 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY VEHICLE TYPE,

2018–2021 ('000 UNITS)

TABLE 69 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY VEHICLE TYPE, 2022–2027 ('000 UNITS)

TABLE 70 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 71 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY VEHICLE TYPE, 2022–2027 (USD MILLION)

8.2 PASSENGER CARS

TABLE 72 PASSENGER CARS MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 73 PASSENGER CARS MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 74 PASSENGER CARS MARKET (ICE), 2018–2021 (USD MILLION)

TABLE 75 PASSENGER CARS MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

8.3 LIGHT COMMERCIAL VEHICLES (LCV)

TABLE 76 LIGHT COMMERCIAL VEHICLES MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 77 LIGHT COMMERCIAL VEHICLES MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 78 LIGHT COMMERCIAL VEHICLES MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 79 LIGHT COMMERCIAL VEHICLES MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

8.4 TRUCKS

TABLE 80 TRUCKS DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 81 TRUCKS DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 82 TRUCKS DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 83 TRUCKS MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

8.5 BUSES

TABLE 84 BUSES DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 85 BUSES DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 86 BUSES DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 87 BUSES DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

9 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE

9.1 INTRODUCTION

9.1.1 RESEARCH METHODOLOGY

9.1.2 ASSUMPTIONS

9.1.3 INDUSTRY INSIGHTS: ELECTRIC & HYBRID VEHICLES, BY VEHICLE TYPE

FIGURE 36 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 88 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE, 2018–2021 ('000 UNITS)

TABLE 89 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE, 2022–2027 ('000 UNITS)

TABLE 90 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE, 2018–2021 (USD MILLION)

TABLE 91 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY VEHICLE TYPE, 2022–2027 (USD MILLION)

9.2 PLUG-IN HYBRID ELECTRIC VEHICLES (PHEV)

9.2.1 GOVERNMENT SUBSIDIES AND INVESTMENTS IN CHARGING

INFRASTRUCTURE TO DRIVE SEGMENT

TABLE 92 PHEV DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 93 PHEV DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 94 PHEV DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 95 PHEV DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

9.3 FUEL CELL ELECTRIC VEHICLES (FCEV)

9.3.1 ENVIRONMENT-FRIENDLY PROPERTIES TO DRIVE DEMAND

TABLE 96 FCEV DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 97 FCEV DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 98 FCEV DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 99 FCEV DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

10 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE

10.1 INTRODUCTION

10.1.1 RESEARCH METHODOLOGY

10.1.2 ASSUMPTIONS

10.1.3 INDUSTRY INSIGHTS: ELECTRIC & HYBRID VEHICLES, BY DIFFERENTIAL TYPE

FIGURE 37 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 100 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 101 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 102 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 103 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

10.2 ELECTRONIC LIMITED SLIP DIFFERENTIAL

TABLE 104 ELSD: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 105 ELSD: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 106 ELSD: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 107 ELSD: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

10.3 LOCKING DIFFERENTIALS

TABLE 108 LOCKING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 109 LOCKING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 110 LOCKING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 111 LOCKING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

10.4 LIMITED SLIP DIFFERENTIALS

TABLE 112 LIMITED SLIP DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 113 LIMITED SLIP DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 114 LIMITED SLIP DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 115 LIMITED SLIP DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

10.5 OPEN DIFFERENTIALS

TABLE 116 OPEN DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 117 OPEN DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 118 OPEN DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 119 OPEN DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

10.6 TORQUE VECTORING DIFFERENTIALS

TABLE 120 TORQUE VECTORING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 121 TORQUE VECTORING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 122 TORQUE VECTORING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 123 TORQUE VECTORING DIFFERENTIALS: ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

11 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY COMPONENT

11.1 INTRODUCTION

11.1.1 RESEARCH METHODOLOGY

11.1.2 ASSUMPTIONS

11.1.3 INDUSTRY INSIGHTS: OE BY COMPONENT TYPE

FIGURE 38 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY COMPONENT TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 124 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY COMPONENT TYPE, 2018–2021 ('000 UNITS)

TABLE 125 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY COMPONENT TYPE, 2022–2027 ('000 UNITS)

TABLE 126 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY COMPONENT TYPE, 2018–2021 (USD MILLION)

TABLE 127 AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY COMPONENT TYPE, 2022–2027 (USD MILLION)

11.2 PINION GEARS

TABLE 128 PINION GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 129 PINION GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY

REGION, 2022–2027 ('000 UNITS)

TABLE 130 PINION GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 131 PINION GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

11.3 DIFFERENTIAL HOUSINGS

TABLE 132 DIFFERENTIAL HOUSINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 133 DIFFERENTIAL HOUSINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 134 DIFFERENTIAL HOUSINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 135 DIFFERENTIAL HOUSINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

11.4 SIDE GEARS

TABLE 136 SIDE GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 137 SIDE GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 138 SIDE GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 139 SIDE GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

11.5 RING GEARS

TABLE 140 RING GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 141 RING GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 142 RING GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 143 RING GEARS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

11.6 DIFFERENTIAL BEARINGS

TABLE 144 DIFFERENTIAL BEARINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 145 DIFFERENTIAL BEARINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 146 DIFFERENTIAL BEARINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 147 DIFFERENTIAL BEARINGS: AUTOMOTIVE DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

12 AUTOMOTIVE DIFFERENTIAL AFTERMARKET (ICE), BY COMPONENT

12.1 INTRODUCTION

12.1.1 RESEARCH METHODOLOGY

12.1.2 ASSUMPTIONS

12.1.3 INDUSTRY INSIGHTS: AFTERMARKET BY COMPONENT TYPE

FIGURE 39 AUTOMOTIVE DIFFERENTIAL AFTERMARKET (ICE), BY COMPONENT TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 148 AUTOMOTIVE DIFFERENTIAL AFTERMARKET (ICE), BY COMPONENT TYPE, 2018–2021 ('000 UNITS)

TABLE 149 AUTOMOTIVE DIFFERENTIAL AFTERMARKET (ICE), BY COMPONENT TYPE, 2022–2027 ('000 UNITS)

TABLE 150 AUTOMOTIVE DIFFERENTIAL AFTERMARKET (ICE), BY COMPONENT TYPE, 2018–2021 (USD MILLION)

TABLE 151 AUTOMOTIVE DIFFERENTIAL AFTERMARKET (ICE), BY COMPONENT TYPE, 2022–2027 (USD MILLION)

12.2 DIFFERENTIAL BEARINGS

TABLE 152 DIFFERENTIAL BEARINGS AFTERMARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 153 DIFFERENTIAL BEARINGS AFTERMARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 154 DIFFERENTIAL BEARINGS AFTERMARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 155 DIFFERENTIAL BEARINGS AFTERMARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

12.3 DIFFERENTIAL GEARS

TABLE 156 DIFFERENTIAL GEARS AFTERMARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 157 DIFFERENTIAL GEARS AFTERMARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 158 DIFFERENTIAL GEARS AFTERMARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 159 DIFFERENTIAL GEARS AFTERMARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

12.4 DIFFERENTIAL GASKETS

TABLE 160 DIFFERENTIAL GASKETS AFTERMARKET (ICE), BY REGION,

2018–2021 ('000 UNITS)

TABLE 161 DIFFERENTIAL GASKETS AFTERMARKET (ICE), BY REGION,
2022–2027 ('000 UNITS)

TABLE 162 DIFFERENTIAL GASKETS AFTERMARKET (ICE)), BY REGION,
2018–2021 (USD MILLION)

TABLE 163 DIFFERENTIAL GASKETS AFTERMARKET (ICE), BY REGION,
2022–2027 (USD MILLION)

12.5 DIFFERENTIAL SEALS

TABLE 164 DIFFERENTIAL SEALS AFTERMARKET (ICE), BY REGION, 2018–2021
(‘000 UNITS)

TABLE 165 DIFFERENTIAL SEALS AFTERMARKET (ICE), BY REGION, 2022–2027
(‘000 UNITS)

TABLE 166 DIFFERENTIAL SEALS AFTERMARKET (ICE), BY REGION, 2018–2021
(USD MILLION)

TABLE 167 DIFFERENTIAL SEALS AFTERMARKET (ICE), BY REGION, 2022–2027
(USD MILLION)

13 OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET, BY EQUIPMENT TYPE

13.1 INTRODUCTION

13.1.1 RESEARCH METHODOLOGY

13.1.2 ASSUMPTIONS

13.1.3 INDUSTRY INSIGHTS: OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET
(ICE), BY EQUIPMENT TYPE

FIGURE 40 OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET (ICE), BY
EQUIPMENT TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 168 OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET (ICE), BY
EQUIPMENT TYPE, 2018–2021 ('000 UNITS)

TABLE 169 OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET (ICE), BY
EQUIPMENT TYPE, 2022–2027 ('000 UNITS)

TABLE 170 OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET (ICE), BY
EQUIPMENT TYPE, 2018–2021 (USD MILLION)

TABLE 171 OFF-HIGHWAY VEHICLE DIFFERENTIAL MARKET (ICE), BY
EQUIPMENT TYPE, 2022–2027 (USD MILLION)

13.2 AGRICULTURAL TRACTORS

TABLE 172 AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY DRIVE
TYPE, 2018–2021 ('000 UNITS)

TABLE 173 AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY DRIVE
TYPE, 2022–2027 ('000 UNITS)

TABLE 174 AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY DRIVE TYPE, 2018–2021 (USD MILLION)

TABLE 175 AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY DRIVE TYPE, 2022–2027 (USD MILLION)

13.2.1 TWO-WHEEL DRIVE

TABLE 176 2WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 177 2WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 178 2WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 179 2WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

13.2.2 FOUR-WHEEL DRIVE

TABLE 180 4WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 181 4WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 182 4WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 183 4WD: AGRICULTURAL TRACTORS DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

13.3 FORKLIFTS

TABLE 184 FORKLIFTS DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 ('000 UNITS)

TABLE 185 FORKLIFTS DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 ('000 UNITS)

TABLE 186 FORKLIFTS DIFFERENTIAL MARKET (ICE), BY REGION, 2018–2021 (USD MILLION)

TABLE 187 FORKLIFTS DIFFERENTIAL MARKET (ICE), BY REGION, 2022–2027 (USD MILLION)

14 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION

14.1 INTRODUCTION

14.1.1 RESEARCH METHODOLOGY

14.1.2 ASSUMPTIONS

14.1.3 INDUSTRY INSIGHTS: DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE
FIGURE 41 AUTOMOTIVE DIFFERENTIAL MARKET, 2022 VS. 2027 (USD MILLION)

TABLE 188 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION, 2018–2021 ('000 UNITS)

TABLE 189 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION, 2022–2027 ('000 UNITS)

TABLE 190 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 191 AUTOMOTIVE DIFFERENTIAL MARKET, BY REGION, 2022–2027 (USD MILLION)

14.2 ASIA PACIFIC

FIGURE 42 ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET SNAPSHOT

TABLE 192 ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 193 ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 194 ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 195 ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

14.2.1 CHINA

14.2.1.1 Booming passenger vehicle demand to fuel market

TABLE 196 CHINA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 197 CHINA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 198 CHINA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 199 CHINA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.2.2 INDIA

14.2.2.1 Growth in vehicle sales to create opportunity for market

TABLE 200 INDIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 201 INDIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 202 INDIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 203 INDIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.2.3 JAPAN

14.2.3.1 Growing use of technologically-advanced differentials to impact market
TABLE 204 JAPAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 205 JAPAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 206 JAPAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 207 JAPAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.2.4 SOUTH KOREA

14.2.4.1 Demand for luxury cars to propel market

TABLE 208 SOUTH KOREA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 209 SOUTH KOREA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 210 SOUTH KOREA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 211 SOUTH KOREA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.2.5 THAILAND

14.2.5.1 Rising demand for automotive components to boost market

TABLE 212 THAILAND: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 213 THAILAND: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 214 THAILAND: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 215 THAILAND: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.2.6 REST OF ASIA PACIFIC

TABLE 216 REST OF ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 217 REST OF ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 218 REST OF ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 219 REST OF ASIA PACIFIC: AUTOMOTIVE DIFFERENTIAL MARKET, BY APPLICATION, 2022–2027 (USD MILLION)

14.3 EUROPE

FIGURE 43 EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, 2022–2027 (USD MILLION)

TABLE 220 EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 221 EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 222 EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 223 EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

14.3.1 GERMANY

14.3.1.1 High demand for premium cars to drive market

TABLE 224 GERMANY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 225 GERMANY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 226 GERMANY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 227 GERMANY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.3.2 FRANCE

14.3.2.1 Increase in production of hybrid vehicles to propel market

TABLE 228 FRANCE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 229 FRANCE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 230 FRANCE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 231 FRANCE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.3.3 UK

14.3.3.1 Rising sales of AWD/4WD vehicles to drive market

TABLE 232 UK: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 233 UK: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 234 UK: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 235 UK: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE,

2022–2027 (USD MILLION)

14.3.4 SPAIN

14.3.4.1 Increased production of passenger cars to create higher requirement for differentials

TABLE 236 SPAIN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 237 SPAIN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 238 SPAIN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 239 SPAIN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.3.5 TURKEY

14.3.5.1 Rising focus on exports to drive market

TABLE 240 TURKEY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 241 TURKEY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 242 TURKEY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 243 TURKEY: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.3.6 RUSSIA

14.3.6.1 Increasing sales of passenger cars to bolster market

TABLE 244 RUSSIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 245 RUSSIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 246 RUSSIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 247 RUSSIA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.3.7 REST OF EUROPE

TABLE 248 REST OF EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 249 REST OF EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 250 REST OF EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 251 REST OF EUROPE: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.4 NORTH AMERICA

FIGURE 44 NORTH AMERICAN AUTOMOTIVE DIFFERENTIAL MARKET SNAPSHOT

TABLE 252 NORTH AMERICA: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 253 NORTH AMERICA: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 254 NORTH AMERICA: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 255 NORTH AMERICA: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

14.4.1 US

14.4.1.1 Increasing production of SUVs and luxury vehicles to drive market

TABLE 256 US: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 257 US: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 258 US: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 259 US: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.4.2 CANADA

14.4.2.1 Rising automotive vehicle production to drive market

TABLE 260 CANADA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 261 CANADA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 262 CANADA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 263 CANADA: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.4.3 MEXICO

14.4.3.1 Growing demand for advanced differential types to drive market

TABLE 264 MEXICO: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 265 MEXICO: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 266 MEXICO: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 267 MEXICO: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.5 ROW

FIGURE 45 ROW: AUTOMOTIVE DIFFERENTIAL MARKET, 2021–2026 (USD MILLION)

TABLE 268 ROW: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 ('000 UNITS)

TABLE 269 ROW: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2022–2027 ('000 UNITS)

TABLE 270 ROW: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, 2018–2021 (USD MILLION)

TABLE 271 ROW: AUTOMOTIVE DIFFERENTIAL MARKET, BY COUNTRY, BY COUNTRY, 2022–2027 (USD MILLION)

14.5.1 IRAN

14.5.1.1 Heavy investments in automotive sector to impact market

TABLE 272 IRAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 273 IRAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 274 IRAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 275 IRAN: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.5.2 BRAZIL

14.5.2.1 Presence of major automotive companies to drive market

TABLE 276 BRAZIL: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 277 BRAZIL: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 278 BRAZIL: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 279 BRAZIL: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

14.5.3 REST OF ROW

TABLE 280 REST OF WORLD: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 ('000 UNITS)

TABLE 281 REST OF WORLD: AUTOMOTIVE DIFFERENTIAL MARKET, BY

DIFFERENTIAL TYPE, 2022–2027 ('000 UNITS)

TABLE 282 REST OF WORLD: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2018–2021 (USD MILLION)

TABLE 283 REST OF WORLD: AUTOMOTIVE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE, 2022–2027 (USD MILLION)

15 RECOMMENDATIONS BY MARKET SAND MARKETS

15.1 ASIA PACIFIC TO BE KEY MARKET FOR AUTOMOTIVE DIFFERENTIALS

15.2 ELECTRONIC LIMITED SLIP DIFFERENTIALS TO GAIN TRACTION

15.3 CONCLUSION

16 COMPETITIVE LANDSCAPE

16.1 OVERVIEW

16.2 MARKET SHARE ANALYSIS, 2021

TABLE 284 MARKET SHARE ANALYSIS FOR AUTOMOTIVE DIFFERENTIAL MARKET, 2021

FIGURE 46 AUTOMOTIVE DIFFERENTIAL MARKET SHARE ANALYSIS, 2021

16.3 REVENUE ANALYSIS OF TOP LISTED/PUBLIC PLAYERS

16.4 COMPETITIVE EVALUATION QUADRANT

16.4.1 TERMINOLOGY

16.4.2 STARS

16.4.3 EMERGING LEADERS

16.4.4 PERVASIVE PLAYERS

16.4.5 PARTICIPANTS

TABLE 285 AUTOMOTIVE DIFFERENTIAL MARKET: COMPANY PRODUCT FOOTPRINT, 2021

TABLE 286 AUTOMOTIVE DIFFERENTIAL MARKET: COMPANY APPLICATION FOOTPRINT, 2021

TABLE 287 AUTOMOTIVE DIFFERENTIAL MARKET: COMPANY REGION FOOTPRINT, 2021

FIGURE 47 AUTOMOTIVE DIFFERENTIAL MANUFACTURERS: COMPETITIVE EVALUATION MATRIX, 2021

16.5 COMPETITIVE SCENARIO

16.5.1 PRODUCT LAUNCHES

TABLE 288 PRODUCT LAUNCHES, 2018–2022

16.5.2 DEALS

TABLE 289 DEALS, 2018–2022

16.5.3 EXPANSIONS

TABLE 290 EXPANSIONS, 2018–2022

16.6 STRATEGIES ADOPTED BY KEY PLAYERS/RIGHT TO WIN, 2018–2022

TABLE 291 KEY GROWTH STRATEGIES, 2018–2022

16.7 COMPETITIVE BENCHMARKING

TABLE 292 AUTOMOTIVE DIFFERENTIAL MARKET: KEY PLAYERS

17 COMPANY PROFILES

(Business overview, Products offered, Recent Developments, MNM view)*

17.1 AUTOMOTIVE DIFFERENTIAL MARKET - KEY PLAYERS

17.1.1 GKN AUTOMOTIVE

TABLE 293 GKN AUTOMOTIVE: BUSINESS OVERVIEW

FIGURE 48 GKN AUTOMOTIVE: COMPANY SNAPSHOT

TABLE 294 GKN AUTOMOTIVE: PRODUCT LAUNCHES

TABLE 295 GKN AUTOMOTIVE: DEALS

TABLE 296 GKN AUTOMOTIVE: EXPANSIONS

17.1.2 EATON CORPORATION PLC

TABLE 297 EATON CORPORATION PLC: BUSINESS OVERVIEW

FIGURE 49 EATON CORPORATION PLC: COMPANY SNAPSHOT

TABLE 298 EATON CORPORATION PLC: PRODUCT LAUNCHES

TABLE 299 EATON CORPORATION PLC: DEALS

TABLE 300 EATON CORPORATION PLC: EXPANSIONS

17.1.3 AMERICAN AXLE & MANUFACTURING, INC.

TABLE 301 AMERICAN AXLE & MANUFACTURING, INC.: BUSINESS OVERVIEW

FIGURE 50 AMERICAN AXLE & MANUFACTURING, INC.: COMPANY SNAPSHOT

TABLE 302 AMERICAN AXLE & MANUFACTURING, INC.: PRODUCT LAUNCHES

TABLE 303 AMERICAN AXLE & MANUFACTURING, INC.: DEALS

TABLE 304 AMERICAN AXLE & MANUFACTURING, INC.: EXPANSIONS

17.1.4 DANA INC.

TABLE 305 DANA INC.: BUSINESS OVERVIEW

FIGURE 51 DANA INC.: COMPANY SNAPSHOT

TABLE 306 DANA INC.: PRODUCT LAUNCHES

TABLE 307 DANA INC.: DEALS

TABLE 308 DANA INC.: EXPANSIONS

17.1.5 BORGWARNER INC.

TABLE 309 BORGWARNER INC.: BUSINESS OVERVIEW

FIGURE 52 BORGWARNER INC.: COMPANY SNAPSHOT

TABLE 310 BORGWARNER INC.: DEALS

TABLE 311 BORGWARNER INC.: EXPANSIONS**17.1.6 LINAMAR CORPORATION****TABLE 312 LINAMAR CORPORATION: BUSINESS OVERVIEW****FIGURE 53 LINAMAR CORPORATION: COMPANY SNAPSHOT****TABLE 313 LINAMAR CORPORATION: PRODUCT LAUNCHES****TABLE 314 LINAMAR CORPORATION: DEALS****TABLE 315 LINAMAR CORPORATION: EXPANSIONS****17.1.7 SCHAEFFLER AG****TABLE 316 SCHAEFFLER AG: BUSINESS OVERVIEW****FIGURE 54 SCHAEFFLER AG: COMPANY SNAPSHOT****TABLE 317 SCHAEFFLER AG: PRODUCT LAUNCHES****TABLE 318 SCHAEFFLER AG: EXPANSIONS****17.1.8 JTEKT CORPORATION****TABLE 319 JTEKT CORPORATION: BUSINESS OVERVIEW****FIGURE 55 JTEKT CORPORATION: COMPANY SNAPSHOT****TABLE 320 JTEKT CORPORATION: PRODUCT LAUNCHES****TABLE 321 JTEKT CORPORATION: DEALS****17.1.9 HYUNDAI WIA CORPORATION****TABLE 322 HYUNDAI WIA CORPORATION: BUSINESS OVERVIEW****FIGURE 56 HYUNDAI WIA CORPORATION: COMPANY SNAPSHOT****TABLE 323 HYUNDAI WIA CORPORATION: PRODUCT LAUNCHES****17.1.10 ZF****TABLE 324 ZF: BUSINESS OVERVIEW****FIGURE 57 ZF: COMPANY SNAPSHOT****TABLE 325 ZF: PRODUCT LAUNCHES****17.2 AUTOMOTIVE DIFFERENTIAL MARKET – ADDITIONAL PLAYERS****17.2.1 AUBURN GEAR****TABLE 326 AUBURN GEAR: COMPANY OVERVIEW****17.2.2 NEAPCO HOLDINGS LLC****TABLE 327 NEAPCO HOLDINGS LLC: COMPANY OVERVIEW****17.2.3 MAGNA****TABLE 328 MAGNA: COMPANY OVERVIEW****17.2.4 DREXLER AUTOMOTIVE GMBH****TABLE 329 DREXLER AUTOMOTIVE GMBH: COMPANY OVERVIEW****17.2.5 QUAIFE ENGINEERING LTD****TABLE 330 QUAIFE ENGINEERING LTD: COMPANY OVERVIEW****17.2.6 XTRAC****TABLE 331 XTRAC: COMPANY OVERVIEW****17.2.7 NSK LTD**

TABLE 332 NSK LTD: COMPANY OVERVIEW

17.2.8 BHARAT GEARS LTD

TABLE 333 BHARAT GEARS LTD: COMPANY OVERVIEW

17.2.9 CUSCO

TABLE 334 CUSCO: COMPANY OVERVIEW

17.2.10 POWERTRAX

TABLE 335 POWERTRAX: COMPANY OVERVIEW

17.2.11 JIANGSU PACIFIC PRECISION FORGING CO., LTD.

TABLE 336 JIANGSU PACIFIC PRECISION FORGING CO., LTD.: COMPANY OVERVIEW

17.2.12 COMMERCIAL GEAR & SPROCKET COMPANY, INC.

TABLE 337 COMMERCIAL GEAR & SPROCKET COMPANY, INC.: COMPANY OVERVIEW

17.2.13 AMTECH INTERNATIONAL

TABLE 338 AMTECH INTERNATIONAL: COMPANY OVERVIEW

17.2.14 MERITOR INC.

TABLE 339 MERITOR INC.: COMPANY OVERVIEW

17.2.15 SHOWA CORPORATION

TABLE 340 SHOWA CORPORATION: COMPANY OVERVIEW

*Details on Business overview, Products offered, Recent Developments, MNM view might not be captured in case of unlisted companies.

18 APPENDIX

18.1 KEY INDUSTRY INSIGHTS

18.2 DISCUSSION GUIDE

18.3 KNOWLEDGESTORE: MARKETSDANDMARKETS' SUBSCRIPTION PORTAL

18.4 CUSTOMIZATION OPTIONS

18.4.1 AUTOMOTIVE DIFFERENTIAL MARKET, BY DRIVE TYPE (COUNTRY LEVEL)

18.4.1.1 FWD

18.4.1.2 RWD

18.4.1.3 AWD/4WD

18.4.2 ELECTRIC & HYBRID VEHICLE DIFFERENTIAL MARKET, BY DIFFERENTIAL TYPE (COUNTRY LEVEL)

18.4.2.1 Electronic limited slip differential (ELSD)

18.4.2.2 Locking differential

18.4.2.3 Limited slip differential (LSD)

18.4.2.4 Open differential

18.4.2.5 Torque vectoring differential

18.5 RELATED REPORTS

18.6 AUTHOR DETAILS

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