

Automotive Drivetrain Market by Drive Type (AWD, RWD, FWD), Vehicle Type (Passenger car, LCV, Buses and Trucks), Electric Vehicle Drive type (BEV, PHEV, HEV), and Region - Global Forecast to 2021

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Abstracts

“The growing demand for comfort and safety in vehicles is expected to fuel the demand for automotive drivetrains”

The automotive drivetrain market is projected to grow at a CAGR of 6.18%, to reach a market size of USD 278.57 billion by 2021. Several countries are attempting to shift to greener and lighter transportation solutions. The heavy, rigid shafts used in Sports Utility Vehicles (SUVs)/Multi-Utility Vehicles (MUVs)/Multi-Purpose Vehicles (MPVs), LCVs, and some big saloon sedans contribute to the weight of the vehicle. The automotive industry is witnessing a growing trend of lightweight hollow shafts. The forged construction of hollow shafts, along with their drilling and heat treatment, significantly reduces the weight of the shaft without compromising its torsional stiffness. These shafts are 15% to 30% lighter than their rigid counterparts. The lightweight shafts are generally equipped in hatchbacks and small and mid-size sedans. OEMs are exhibiting a growing inclination towards lightweight hollow shafts, and are using them in SUVs/MUVs/MPVs.

“Battery Electric Vehicles constitute the fastest growing segment of the automotive drivetrain market, by vehicle type”

Battery Electric Vehicles (BEVs) are expected to dominate the electric vehicle segment of the automotive drivetrain market. According to the International Energy Agency, 1 million electric cars were sold in 2015. Ambitious targets and policy support have lowered vehicle costs, extended vehicle range, and reduced consumer barriers in a

number of countries. The market share of electric cars rose above 1% in seven countries in 2015: Norway, The Netherlands, Sweden, Denmark, France, China, and the U.K. Industries, governments, and early adopters have succeeded in demonstrating that electric cars can deliver the practicality, sustainability, safety, and affordability expected from them.

“Better vehicle control in unfavourable terrains expected to increase the demand for automotive drivetrains”

A vehicle loses traction in accident-prone conditions such as heavy rain, icy roads, and watery surfaces. In countries such as the U.S., Canada, and Germany, where roads are frequently covered with heavy snow, vehicles require additional grip and better traction to be sufficiently under the control of the driver. In such situations, vehicles equipped with All-Wheel Drive (AWD) perform well. In rough terrain conditions such as uneven, rocky surfaces, where the traction on all four wheels is never equal, the need for the distribution of torque to different wheels at different times is met by AWD systems. These systems can send an optimal amount of torque to the tires on demand, providing better traction and stability to the vehicle. Owing to these factors, the demand for AWDs is estimated to increase in regions where the aforementioned conditions exist.

“Asia-Pacific: Fastest growing market for automotive drivetrains”

Asia-Pacific is estimated to dominate the drivetrain market, and is projected to grow at the highest CAGR during the forecast period. China and Japan are the largest contributors to the global sales and production of Internal Combustion Engine (ICE) vehicles. The Asia-Pacific market is currently dominated by Front Wheel Drive (FWD) vehicles, but Rear Wheel Drive (RWD) and AWD vehicles are also witnessed substantial growth. FWDs are typically used in family cars that offer better fuel economy and moderate performance. The relatively calm weather in the Asia-Pacific region eliminates the need for better performance and traction, which is the key advantage of AWD. However, automotive manufacturers are developing new technologies for AWD vehicles to enhance fuel economy. This is expected to spur the growth of the AWD segment in the region. AWDs are rapidly gaining popularity in the Chinese and Indian markets due to the introduction of compact crossovers that offer better traction.

BREAKDOWN OF PRIMARIES

The study contains insights provided by various industry experts, ranging from equipment suppliers to Tier 1 companies and OEMs. The break-up of the primaries is

as follows:

By Company Type – Tier 1 - 31 %, Tier 2 - 57%, and OEMs - 12%

By Designation - C level - 41%, D level - 19%, and Others - 40%

By Region - North America -23%, Europe - 34%, and Asia-Pacific - 43%

The report provides detailed profiles of the following companies:

Aisin Seiki Co., Ltd.

American Axle & Manufacturing, Inc.

BorgWarner Inc.

GKN plc

Dana Holding Corporation

ZF TRW

Magna International Inc.

Schaeffler Group

Showa Corporation

JTEKT Corporation

Study Coverage

The drivetrain market has been segmented based on vehicle type (passenger car, Light Commercial Vehicle (LCV), and Heavy Commercial Vehicle (HCV)), drive type (FWD, RWD, and AWD), region (Asia-Pacific, North America, Europe, and Rest of the World), and electric vehicle drivetrain (BEV, Plug-In Hybrid Electric Vehicle (PHEV), and Hybrid Electric Vehicle (HEV)). The market has been provided in terms of volume ('000/units)

and value (USD billion).

Reasons to Buy the Report:

This report contains various levels of analysis, including industry analysis (industry trends, Porter's Five Forces, and competitive analysis) and company profiles, which together comprise and discuss the basic views on the emerging and high-growth segments of the drivetrain market, competitive landscape, high-growth regions and countries, government initiatives, and market dynamics such as drivers, restraints, opportunities, and challenges.

The report enables new entrants/smaller firms as well as established firms to understand the market better and consequently acquire a larger market share. Firms purchasing the report could use any one or a combination of the below-mentioned four strategies (market development, product development/innovation, market diversification, and competitive assessment) to strengthen their position in the market.

The report provides insights with reference to the following points:

Market Development: Comprehensive information about lucrative emerging markets. The report analyzes the automotive drivetrain market across regions

Product Development/Innovation: Detailed insights into R&D activities, upcoming technologies, and new product launches in the automotive drivetrain market

Market Diversification: Detailed information about untapped markets, investments, new products, and recent developments in the automotive drivetrain market

Competitive Assessment: In-depth assessment of strategies, products, and manufacturing capabilities of leading players in the automotive drivetrain market

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