

# **Automotive Gears Market by Type (Planetary, Bevel, Rack & Pinion, Hypoid, Worm, Helical, Spur, Non-metallic), Application (Transmission, Differential, Steering, Others), Vehicle Type, Propulsion (ICE, Hybrid), Material, & Region - Global Forecast to 2030**

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## **Abstracts**

The global automotive gears market is expected to grow from USD 42.7 billion in 2024 to 50.8 billion in 2030, it is projected to grow at a CAGR of 3.0% in the projected period. According to OICA, global vehicle production increased from 84.8 million units in 2020 to 93.5 million in 2023. Each vehicle uses gears in transmission systems, differentials, steering systems, and other applications; hence, with the rise in vehicle production, the market for metallic automotive gears will grow in the coming years.

Additionally, the demand for mid- and full-size SUVs and premium vehicles has increased in developed and developing countries, with increasing disposable income, consumers' demand for ride quality, and rising brand awareness. These vehicles are prompting the growth of the metallic and non-metallic automotive gears market.

“The passenger cars segment is estimated to be the largest segment for automotive gears.”

Passenger cars will hold the largest market share in the global automotive gear market during the forecast period. The growth mainly comes from the maximum share of passenger cars in global vehicle production, which grew from 62.8 million units in 2021 to 69.2 million units in 2023, a rise of 17.8%. The demand for gears is higher in passenger cars, attributed to increasing fitments for steering mechanisms, transmissions, differentials, sunroofs, ORVMs, automated tailgates, power windows, and others. Moreover, the growing adoption of advanced transmission systems such as

DCT and Automatic Manual Transmission in passenger cars further fuels the demand for transmission gears. With customers having drifted towards performance and efficiency, OEMs have shifted more towards installing 6-speed gearboxes. With the coming of age of AMT, its installation has increased by multitudes in lower-end cars. In the global market, it is projected that increasing demand for SUVs in the year 2023 has happened, with an increase in mid-size & full-size SUVs from 11.8 & 10.7 million units in 2020 to 14.8 & 15.9 million units in 2023, respectively. In the US, SUVs make up almost half of all cars sold, and a third in Europe. This will, in turn, drive the growth of gears such as hypoid, pinion, and bevel gears for differential systems. More than 80% of global production is dominated by the US, Canada, China, Japan, and South Korea in premium SUV and sedan cars. They are fitted with standard electric components and help drive demand for non-metallic gears. Thus, the growing number of passenger cars with automated manual transmissions and the rising SUVs with RWD and AWD drive are expected to boost the demand for automotive gears market.

“The non-metallic gears are expected to be the fastest growing segment by material.”

By material segment, the non-metallic gears are estimated to grow fastest. There has been a sharp rise in the production of c-segment and above vehicles from 2020, as these vehicles have grown from 37.3 million units in 2020 to 45.8 million units in 2023. Due to the rising demand for comfort and convenience features, automotive OEMs increasingly offer power windows, electrically controlled ORVMs, large-size panoramic electric sunroofs, and electric tailgate releases in mid and high variants of vehicles. These gears are often made from non-metallic materials, specifically thermoplastics. The rising demand for premium cars in some developed and developing countries will also drive the market for non-metallic gears as these vehicles are equipped with most of these features as an OE-fitted functionality.

“Europe is the second largest market for automotive gears.”

By region, Europe will have the 2nd largest market share of the automotive gears market during the forecast period. According to OICA, the total car production in Europe was 15.4 million units in 2023. Similarly, Europe's LCV production in 2023 was 2.2 million units. The European automotive industry is dominated by established OEMs such as Mercedes-Benz (Germany), Volkswagen (Germany), BMW (Germany), Citroen (France), Fiat (Italy), and Land Rover (UK). Further, the share of premium or luxury cars fitted with different features such as automated tailgates, ORVMs, Adaptive Cruise control, lane parking assist, and electric sunroofs in Europe is increasing rapidly, mainly in Germany, France, the UK, and Italy. These premium cars fitted with advanced

features require non-metallic gears. Premium vehicles equipped with automatic or Dual-clutch transmission are expected to drive the demand for helical and planetary gears.

Additionally, Europe is the second largest manufacturer of buses and coaches; it is estimated to produce more than 45,000 units in 2023. Besides, this region is also known to have inclined luxury cars, and significant luxury automotive OEMs have a strong presence in this region. These volumes of vehicles are supposed to lead the market for automotive gears in Europe. Hence, rising passenger car production and growing penetration of premium vehicles with different features will drive the demand for the European automotive gears market.

The breakup of primary respondents

By Company: Tier 1 – 50%, Tier 2 – 30%, OEMs -20%

By Designation: C level Executives - 60%, Director Level - 30%, Others – 10%

By Region: North America - 25%, Europe - 20%, Asia Pacific - 55%

Global players dominate the automotive gears market and comprise several regional players, including American Axle & Manufacturing Holding, Inc. (US), GKN Powder Metallurgy (US), Bharat Gears Ltd. (India), JTEKT Corporation (Japan), and Robert Bosch GmbH (Germany). The study includes an in-depth competitive analysis of these key players in the automotive gears market with their company profiles, MnM view of the top five companies, recent developments, and key market strategies.

Research Coverage

The study's primary objective is to define, describe, and forecast the automotive gears market by value and volume. The study segments the automotive gears market by vehicle type (passenger cars, light commercial vehicles, and heavy commercial vehicles), by material (metallic gears and non-metallic gears), by application (transmission system, differential system, steering system, and other automotive gears), by gear type (planetary gears, bevel gears, rack, and pinion gears, hypoid gears, worm gears, helical gears, spur gears, and non-metallic gears), electric and hybrid vehicle by application (transmission system, differential system, steering system, and other automotive gears), transmission gears market by transmission type (automatic transmission, automated manual transmission, manual transmission, and dual-clutch

transmission), differential gears market by gear type (bevel gears, pinion gears, hypoid gears, helical gears, worm gears and spur gears) and region (North America, Europe, Asia Pacific, and RoW). It analyzes the opportunities offered by various market segments to the stakeholders. It tracks and analyzes competitive developments such as market ranking analysis, expansions, joint ventures, acquisitions, and other activities carried out by key industry participants.

Reasons to buy this report:

This report offers comprehensive analyses of market share and supply chains and detailed information on gear manufacturers. It is designed to help market leaders and new entrants by providing precise revenue estimates for the overall automotive gears market. Additionally, the report helps stakeholders understand the market dynamics, highlighting key drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (rise in production of vehicles to drive the growth of the automotive gears market, including the rise in several passenger cars and light commercial vehicles, rise in the number of mid-range and luxury vehicles, rise in the number of SUVs and heavy commercial vehicles and buses and coaches and growing demand for low-carbon-footprint technologies), restraints (increasing popularity of electric cars), opportunities (adoption of lightweight gear materials, growth in number of hybrid vehicles and rising adoption of polymer/plastic gears in automotive applications), and challenges (high costs of advanced and light-weight gears) are fueling the demand of the automotive gears market.

The report provides a detailed country analysis of the type of gears used in transmission types (automatic transmission, automated manual transmission, manual transmission, and dual-clutch transmission) and differential types (open differential, locking differential, limited slip differential, torque vectoring differential, and Torsen differential)

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the automotive gears market, such as using various materials to manufacture the gears, such as metallic and non-metallic gears.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the automotive gears market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the automotive gears market

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and product offerings of leading players in the automotive gears market, such as American Axle & Manufacturing Holding, Inc. (US), GKN Powder Metallurgy (US), Bharat Gears Ltd. (India), JTEKT Corporation (Japan), and Robert Bosch GmbH (Germany).

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