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Transfer Case Market by Drive Type (Chain, Gear Driven), Shift Type (Electronic, Manual), Type (AWD, 4WD), Off-Highway (Construction Equipment, Farm Tractor), Ice & Hybrid Vehicle (Passenger Car, LCV, HCV, HEV, PHEV), and Region - Global Forecast to 2025

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Abstracts

“Increasing sales of SUV and premium sedans to fuel the market demand for transfer case”

The transfer case market is estimated to be USD 9.79 billion in 2017 and is projected to grow to USD 20.33 billion by 2025, at a CAGR of 9.56% during the forecast period. The increasing sales of SUVs and premium sedans is the key growth driver for the transfer case market. The increasing demand for safety and traction in extreme weather or surface condition and need for easy maneuverability are other factors driving the demand for AWD and 4WD across the globe. The increasing demand for AWD and 4WD would, in turn, fuel the demand for transfer case market. On the other hand, the increasing demand for battery electric vehicles can hinder the growth of the transfer case market. As BEVs do not use a transfer case for power distribution, the increasing popularity of these vehicles will impact the growth of the transfer case market in the long term.

“Passenger car is the fastest growing vehicle segment in the transfer case market”

The passenger car segment, which includes a sedan, hatchback, SUV, and crossover SUV, is estimated to be the fastest growing market for transfer case. In passenger cars, the SUV segment is the most promising market for transfer case as most of the SUVs

are equipped with 4WD or AWD. Asia Pacific is estimated to be the largest transfer case market for passenger cars owing to the huge vehicle production with 4WD or AWD. Subaru Forester, Mazda CX-5, Haval H6, and Toyota RAV4 are some of the top-selling SUVs equipped with a transfer case in the Asia Pacific region. North America is estimated to be the largest transfer case market for LCV segment. The high sales of SUVs and light pickup trucks drive the market growth in the North American region. Both these vehicle types have been considered under the LCV segment for the North American region.

“Asia Pacific region constitutes the largest share of transfer case market”

Asia Pacific is estimated to be the largest market for transfer case during the forecast period. The high share of passenger cars in the total vehicle production and growing demand for sport utility vehicles (SUV) are expected to drive the transfer case market in Asia Pacific. While the penetration of transfer case in passenger vehicles in Asia Pacific ranges between 15-18% in 2017, it is expected to increase to 22-24% by 2025. The installation rate of transfer case in passenger vehicles in Japan and South Korea is estimated to be 34% and 24%, respectively in 2017. This is expected to increase to 43% and 31%, respectively by 2025. The market growth can be attributed to the rapid increase in the demand for high-performance SUVs with 4WD or AWD that offer better safety and comfort. Toyota, Subaru, and Mitsubishi are the leading OEMs that are launching vehicles equipped with 4WD/AWD in the Asia Pacific region.

BREAKDOWN OF PRIMARIES

The study contains insights provided by various industry experts, ranging from transfer case component suppliers to drivetrain suppliers and OEMs. The break-up of the primaries is as follows:

? By Company Type –Tier-1 - 33%, Tier 2 - 50% and Others- 17%.
? By Designation - D level - 17%, C level – 33%, and Others - 50%
? By Region – Europe-16%, Asia-Pacific - 17%, North America - 67%

The report provides detailed profiles of major companies in the transfer case market, which include BorgWarner (US), Magna (Canada), GKN (UK), ZF (Germany), Aisin Seiki (Japan), Dana (US), American Axle & Manufacturing (US), JTEKT (Japan), Schaeffler (Germany), and Meritor (US) to name a few.

Research Coverage:

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The report analyzes the transfer case market across different verticals and regions. It aims at estimating the market size and growth potential of the transfer case market by region (Asia Pacific, Europe, North America, RoW), drive type (Gear Driven, Chain Driven), 4WD type (4WD, AWD), off-highway vehicles (Construction Equipment, Farm Tractors), shift type (Manual Shift On-the-Fly, Electronic Shift On-the-Fly), vehicle type (PC, LCV, HCV), and hybrid vehicle type (HEV, PHEV). Furthermore, the report also includes an in-depth competitive analysis of the key players in the market along with their company profiles, recent developments, and key market strategies.

Reasons to buy the Report:

The report will help the market leaders/new entrants in this market by providing them the closest approximations of the revenue numbers for the transfer case market. It will help stakeholders to better understand the competitor landscape and gain more insights to better position their businesses and make suitable go-to-market strategies. The report would also help the stakeholders to understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.

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