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Driveline Market Forecasts to 2032 – Global Analysis By Vehicle Type (Passenger Cars, Commercial Vehicles and Off-Highway Vehicles), Component, Motor Output, Propulsion Type, Drive Type, Architecture and By Geography

https://marketpublishers.com/r/D84701DACF10EN.html
Date: September 2025
Pages: 200
Price: US$ 4,150.00 (Single User License)
ID: D84701DACF10EN

Abstracts

According to Stratistics MRC, the Global Driveline Market is accounted for $157.50 billion in 2025 and is expected to reach $221.62 billion by 2032 growing at a CAGR of 5.0% during the forecast period. The driveline, also known as the drivetrain minus the engine, plays a vital role in delivering power to the wheels of a vehicle. It includes essential parts like the transmission, axles, differential, driveshafts, and transfer cases in vehicles with all-wheel or four-wheel drive. Its primary function is to transfer the engine's power to the wheels while managing torque and speed for diverse road and driving conditions. Modern driveline systems emphasize efficiency, lower emissions, and improved performance. As electric and hybrid vehicles become more widespread, driveline technologies are adapting to ensure smooth, efficient, and reliable power delivery with enhanced energy utilization.

According to the International Energy Agency (IEA), global electric car sales exceeded 14 million in 2023, representing 18% of total car sales worldwide, up from just 4% in 2020. This surge directly drives demand for electric drivelines, e-axles, and transmission innovations in the automotive sector.

Market Dynamics:

Driver:

Growing demand for fuel-efficient vehicles

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The driveline market experiences strong growth due to the rising preference for vehicles offering better fuel efficiency. Escalating fuel costs and increasing emphasis on eco-friendly transportation push consumers toward cars that maximize mileage and performance. Manufacturers are incorporating advanced driveline technologies, including lightweight designs, improved transmissions, and enhanced torque management, to meet these needs. Additionally, regulatory bodies worldwide are enforcing strict fuel-efficiency norms, compelling automakers to invest in driveline innovations. This trend not only cuts fuel usage but also reduces harmful emissions, supporting global sustainability targets. As a result, the pursuit of fuel economy remains a key factor propelling the driveline market forward.

Restraint:

High manufacturing costs

One of the key limitations in the driveline market is the elevated cost of production. Developing lightweight materials, precision transmissions, and advanced electronically controlled differentials demands significant investment in research, manufacturing, and quality assurance. These expenses are often reflected in the final product price, making advanced vehicles less accessible in cost-sensitive regions. The adoption of hybrid and electric driveline technologies adds further financial burden. Smaller manufacturers face challenges competing with large, established companies due to these high production costs. Consequently, the expensive nature of driveline components restrains market growth, slowing the proliferation of advanced systems and limiting the pace of technological adoption globally.

Opportunity:

Lightweight and advanced materials adoption

Adopting advanced lightweight materials offers notable growth potential in the driveline market. Components made from carbon composites, aluminum alloys, and high-strength steel reduce vehicle mass, boost efficiency, and enhance performance while ensuring durability. These innovations also support compliance with strict emission and fuel-economy standards. Automotive manufacturers are investing in material science and engineering to create drivelines that maintain safety and robustness while lowering weight. By incorporating cutting-edge materials, driveline producers can provide efficient, reliable, and environmentally friendly solutions, aligning with consumer

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expectations. This shift toward advanced materials presents a strong opportunity to innovate and gain a competitive edge in the global automotive market.

Threat:

Rapid technological changes

The driveline market faces threats from the swift pace of technological innovation in the automotive sector. Developments in electric, autonomous, and connected vehicles demand continuous upgrades to driveline systems to maintain competitiveness. Manufacturers that fail to keep up risk obsolescence as advanced, more efficient driveline technologies replace older components. This rapid innovation cycle drives up research and development expenses and can strain smaller players with limited budgets. Moreover, integrating new systems with existing vehicles and infrastructure may pose challenges, slowing market adoption. As a result, the fast evolution of automotive technology is a major threat, requiring driveline companies to adapt rapidly and remain technologically current.

Covid-19 Impact:

The COVID-19 outbreak caused major setbacks for the global driveline industry, disrupting manufacturing operations and supply chains. Temporary plant closures and workforce restrictions delayed the production of key driveline components. Shortages of raw materials, electronic parts, and intermediate products further affected manufacturing timelines. The pandemic-induced economic slowdown and reduced vehicle purchases decreased the demand for drivelines across both passenger and commercial segments. To manage the situation, automakers implemented cost-reduction strategies and adjusted operational plans. Despite these setbacks, the market is showing signs of recovery as production stabilizes and consumer demand returns, maintaining long-term growth potential and opportunities for driveline manufacturers worldwide.

The transmission segment is expected to be the largest during the forecast period

The transmission segment is expected to account for the largest market share during the forecast period due to its essential role in transferring engine power to the wheels efficiently. It regulates torque and speed for diverse driving conditions, improving fuel economy, performance, and overall vehicle handling. Technological advancements, including automatic, dual-clutch, and continuously variable transmissions, have further

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enhanced its prominence. Automakers focus on developing transmissions that increase reliability, minimize energy loss, and accommodate hybrid and electric power trains. Its vital contribution to vehicle functionality and extensive use across passenger cars, commercial vehicles, and EVs solidifies the transmission segment as the largest and most influential component in the global driveline market.

The battery electric vehicle (BEV) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the battery electric vehicle (BEV) segment is predicted to witness the highest growth rate, driven by the global shift toward electric mobility. BEVs utilize sophisticated driveline technologies, such as electric axles, regenerative braking systems, and electronically controlled differentials, to maximize energy efficiency and power management. Supportive government policies, stricter environmental regulations, and rising consumer preference for eco-friendly vehicles are further fueling expansion. Automakers are investing in R&D to enhance the performance, durability, and efficiency of BEV drivelines. As electrification accelerates across automotive markets, the BEV segment stands out as the fastest-growing sector, offering substantial opportunities for innovation and market development.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by high automotive production, expanding vehicle demand, and rapid industrial growth in countries such as China, Japan, and India. Increasing disposable income, improved urban infrastructure, and strong consumer preference for passenger and commercial vehicles are key growth factors. Automakers and driveline component suppliers are investing significantly in local manufacturing plants and research facilities to serve the rising market demand. The region’s well-established automotive ecosystem, combined with favorable government policies and incentives, strengthens its leadership position. As a result, Asia-Pacific maintains the largest market share in the global driveline industry, fueling both innovation and overall market expansion.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, fueled by increasing adoption of hybrid and electric vehicles, strict environmental regulations, and rising demand for advanced, high-performance automobiles. Significant investments in innovative driveline systems, such as e-axles,

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electronically managed differentials, and torque-vectoring transmissions, are driving this expansion. Automakers in the United States and Canada are emphasizing R&D to improve efficiency, durability, and sustainability of driveline technologies. Supportive government policies, subsidies for eco-friendly vehicles, and enhanced infrastructure further accelerate adoption. As a result, North America is positioned as the fastest-growing region in the driveline market, presenting ample opportunities for technological advancement and commercial growth.

Key players in the market

Some of the key players in Driveline Market include Robert Bosch GmbH, GKN Driveline (Melrose Industries PLC), Delphi Technologies, Denso Corporation, Valeo Inc., Continental AG, Schaeffler Technologies AG & Co. KG, BorgWarner Inc., ZF Friedrichshafen AG, Dana Incorporated, American Axle & Manufacturing, Hitachi Ltd., Mahindra & Mahindra Ltd, MSL Driveline Systems Limited and Aisin Seiki Co., Ltd.

Key Developments:

In July 2025, Valeo Foods Group has successfully acquired the assets of an Italian panettone, pandoro and croissant producer, Melegatti 1894 S.p.A. This acquisition is another step forward in Valeo Foods Groups' strategy to expand its baked sweet treats portfolio, and reinforces Valeo's commitment to bringing authentic Italian confections and established regional brands to a wider international audience.

In November 2024, Bosch Corporation, the Japanese subsidiary of Robert Bosch GmbH concluded a 'Comprehensive Partnership Agreement to Invigorate the Local Community' with Tsuzuki Ward, Yokohama. Through the partnership agreement, Bosch and Tsuzuki Ward, Yokohama, will strengthen their collaboration to further invigorate the local community.

In October 2024, Denso Corporation and Quadric.inc have signed a development license agreement for a Neural Processing Unit (NPU)*1, which is a semiconductor specialized for the arithmetic processing of AI. Through the agreement, DENSO will acquire the IP core license for Quadric's Chimera GPNPU*2, and the two companies will co-develop intellectual property (NPU) for an in-vehicle semiconductor.

Vehicle Types Covered:

- Passenger Cars

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Commercial Vehicles

Off-Highway Vehicles

Components Covered:

Transmission

Driveshaft

Axles

Differentials

E-Axles

Transfer Case

Clutch

Torque Converter

Motor Outputs Covered:

45-100 kW

101-250 kW

Above 250 kW

Propulsion Types Covered:

Internal Combustion Engine (ICE)

Battery Electric Vehicle (BEV)

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Plug-in Hybrid Electric Vehicle (PHEV)

Fuel Cell Electric Vehicle (FCEV)

Drive Types Covered:

Front-Wheel Drive (FWD)

Rear-Wheel Drive (RWD)

All-Wheel Drive (AWD)

Four-Wheel Drive (4WD)

Architectures Covered:

Series Hybrid

Parallel Hybrid

Power Split Hybrid

EV Driveline

Regions Covered:

North America

US

Canada

Mexico

Europe

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- Germany
- UK
- Italy
- France
- Spain
- Rest of Europe

Asia Pacific

- Japan
- China
- India
- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

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Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as

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per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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