

Automotive Passenger Car Clutch Plate Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Less than 9 inches, 9.1 to 10 inches, 10.1 to 11 inches, More than 11 inches), By Demand Category (OEM, Aftermarket) By Region & Competition, 2021-2031F

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Abstracts

The Global Automotive Passenger Car Clutch Plate Market is projected to expand from USD 3.87 Billion in 2025 to USD 6.39 Billion by 2031, registering a CAGR of 8.72%. This mechanical component, composed of a metallic disc lined with friction material, serves the critical function of engaging and disengaging power transmission between the engine and gearbox in internal combustion engine vehicles. Market growth is primarily underpinned by increasing global passenger vehicle manufacturing and the enduring popularity of manual and automated manual transmissions in emerging markets, where cost-effectiveness remains a priority. Furthermore, the inevitable wear inherent to friction-based components ensures steady demand from the aftermarket sector, providing a reliable revenue stream distinct from new vehicle sales cycles.

Despite these robust drivers, the shift toward electric mobility poses a significant barrier to long-term growth, as battery electric vehicles generally utilize single-speed drivetrains lacking traditional clutch systems. This friction between established manufacturing volumes and technological evolution is highlighted by recent industry metrics. According to the China Association of Automobile Manufacturers, passenger car production hit 27.48 million units in 2024, demonstrating the continued magnitude of the internal combustion engine sector which currently upholds demand for clutch components even as powertrain technologies gradually evolve.

Market Driver

The increasing global production and sales of passenger vehicles serve as the primary engine for the automotive clutch plate market, directly fueling demand from original equipment manufacturers (OEMs). This influence is especially strong in developing regions where infrastructure constraints and consumer preferences continue to favor internal combustion engine (ICE) models over fully electric options. As manufacturers scale operations to satisfy mobility demands in these high-growth economies, the need for standard transmission parts, such as friction discs and pressure plates, rises accordingly. For instance, the Society of Indian Automobile Manufacturers reported in April 2025 that passenger vehicle sales in India achieved a record high of 4.3 million units for the 2024-25 fiscal year. Similarly, traditional manufacturing hubs remain vital; the German Association of the Automotive Industry noted in January 2025 that domestic passenger car production in Germany reached 4.1 million units in 2024, highlighting the persistent scale of conventional automotive assembly.

Concurrently, the growth of the automotive aftermarket and replacement parts sector offers a crucial safeguard against fluctuations in new vehicle sales, securing market stability over the long term. Since clutch plates are friction-dependent components that naturally degrade, they remain essential replacement items throughout a vehicle's lifespan. This segment is further strengthened by economic conditions prompting owners to keep vehicles longer, raising the global fleet's average age and the probability of major powertrain maintenance. As vehicles age, clutch servicing becomes more frequent, generating supplier revenue unrelated to OEM production schedules. According to the Society of Motor Manufacturers and Traders, by April 2025, the average age of cars on UK roads increased to 9.5 years, a statistic that directly indicates growing opportunities for the clutch replacement sector.

Market Challenge

The rapid shift toward electric mobility represents the most significant hurdle limiting the expansion of the global automotive passenger car clutch plate market. While internal combustion engine vehicles depend on friction-based clutch systems to manage power transfer between the engine and gearbox, battery electric vehicles (BEVs) typically employ single-speed transmissions that render the traditional clutch plate unnecessary. This technical shift means that as the automotive industry ramps up output to meet global transportation needs, an increasing percentage of new vehicles effectively bypasses the clutch supply chain, severing the established link between growing vehicle production and component demand.

This disruption is clearly reflected in recent market dynamics, where the uptake of electric powertrains is eroding the total addressable market for friction components. Data from the European Automobile Manufacturers' Association indicates that in 2024, battery-electric cars accounted for a 13.6% market share, representing a significant volume of new registrations that offered no revenue opportunities for clutch plate manufacturers. Consequently, the industry is confronting a structural contraction wherein broader automotive sector growth does not ensure parallel gains for clutch suppliers, compelling them to depend increasingly on the remaining internal combustion segment.

Market Trends

The advancement of specialized high-torque clutches for hybrid powertrains is reshaping the technical landscape of the friction component industry, acting as a vital link between internal combustion dominance and complete electrification. Unlike battery electric models, hybrid systems preserve the requirement for power transmission disconnect mechanisms while necessitating enhanced damping features to handle the frequent start-stop cycles and instant torque characteristic of electric motor integration. This continued dependence on combustion-paired technology guarantees ongoing industrial demand for clutch manufacturers even as pure internal combustion engines become less common. Highlighting this trend, the European Automobile Manufacturers' Association reported in November 2025 that hybrid-electric vehicles solidified their position by capturing a 34.6% share of the European market, confirming the widening scope for these specialized transmission parts.

Simultaneously, the widespread integration of Dual-Clutch Transmission (DCT) architectures is driving a structural rise in the quantity of friction discs needed per vehicle. By employing two separate clutch actuation systems to control odd and even gears, DCTs effectively double the friction material required compared to standard manual or automated manual gearboxes, while delivering improved shift speeds and fuel economy. This architectural evolution enables suppliers to boost their value content per vehicle, helping to counterbalance volume declines in other areas. The financial robustness of key suppliers supports this shift; for example, Valeo reported in November 2025 that its Power division, which includes transmission systems, achieved sales growth surpassing global automotive production, fueled by the accelerating adoption of electrified and advanced transmission technologies.

Key Market Players

ZF Friedrichshafen AG

BorgWarner Inc

Valeo S.A

Eaton Corporation Plc

FCC Co. Ltd

Clutch Auto Ltd.

Schaeffler AG

EXEDY Corporation

NSK Ltd

Aisin Seiki Co. Ltd

Report Scope

In this report, the Global Automotive Passenger Car Clutch Plate Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Passenger Car Clutch Plate Market, By Type

Less than 9 inches

9.1 to 10 inches

10.1 to 11 inches

More than 11 inches

Automotive Passenger Car Clutch Plate Market, By Demand Category

OEM

Aftermarket

Automotive Passenger Car Clutch Plate Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Passenger Car Clutch Plate Market.

Available Customizations:

Global Automotive Passenger Car Clutch Plate Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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