

# **Automotive Drivetrain Technology Market - Global Industry Size, Share, Trends Opportunity, and Forecast 2018-2028 Segmented By Vehicle Type (Passenger Car, Buses, and Trucks) and By Technology (Central Motor, E-axle, and Wheel Hub Module), By Region, Competition**

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## **Abstracts**

The Global Automotive Drivetrain Technology Market achieved a substantial size of USD 35.2 billion in 2022.

The Global Automotive Drivetrain Technology Market represents a critical sector within the automotive industry, dedicated to the intricate mechanisms responsible for transferring power from the engine to the vehicle's wheels. This complex network of components plays a pivotal role in determining a vehicle's performance, efficiency, and overall driving experience. Drivetrain technology encompasses a diverse array of systems, including transmissions, axles, differentials, and drive shafts, all collaborating harmoniously to ensure optimal power delivery and control across various road conditions.

In recent times, the automotive drivetrain landscape has undergone significant transformation, driven by technological innovations and shifting market dynamics. The emergence of electrification and hybridization has spurred the development of electric drivetrains, comprising electric motors, power electronics, and battery systems. This shift aligns seamlessly with the automotive industry's commitment to reducing carbon emissions and fostering sustainability.

Moreover, there exists a growing emphasis on enhancing fuel efficiency and optimizing

power distribution through innovative transmission technologies. Examples of these systems include automated manual transmissions, continuously variable transmissions (CVTs), and dual-clutch transmissions (DCTs), all designed to strike a balance between performance and fuel economy. Drivetrain technology is also deeply interlinked with advancements in autonomous driving and connectivity. As vehicles become smarter, drivetrains must be seamlessly integrated with sensors, control units, and AI algorithms to facilitate smooth interaction with other vehicle systems and external environments.

Challenges encountered within the automotive drivetrain technology sector encompass the complexities of integrating electric and traditional drivetrains, ensuring compatibility with emerging autonomous systems, and navigating stringent emissions regulations that influence the design of internal combustion engine components.

The global automotive drivetrain technology market finds itself amidst a profound transformation, driven by a convergence of factors reshaping the automotive industry. Central to this evolution is the mounting pressure to curtail carbon emissions, resulting in stricter environmental regulations on a global scale. This has prompted automotive manufacturers to reevaluate their drivetrain technologies, placing a strong emphasis on developing more sustainable and fuel-efficient solutions.

One of the most notable trends is the escalating adoption of electric drivetrains. Battery Electric Vehicles (BEVs) and Hybrid Electric Vehicles (HEVs) have garnered immense popularity, with consumers gravitating towards eco-friendly transportation options. Consequently, automakers are making substantial investments in research and development to produce high-capacity batteries, advanced electric motors, and efficient power electronics.

Simultaneously, the fusion of connectivity and autonomous features into drivetrains is reshaping the automotive landscape. Drivetrains are becoming more intelligent, capable of real-time data analysis, and proficient in communicating with other vehicle systems. This connectivity enhances safety, facilitates predictive maintenance, and enables over-the-air software updates, ultimately enhancing overall vehicle performance and user experience.

Regional variations are evident in the global automotive drivetrain technology market. North America and Europe are leading the way in adopting electric vehicles, driven by stringent emission standards and a growing commitment to sustainable transportation. Meanwhile, Asia-Pacific, including China, serves as a thriving hub for drivetrain

technology manufacturing and innovation, with a specific focus on electrification and autonomous driving.

The Global Automotive Drivetrain Technology Market remains a dynamic arena, spurred by the pursuit of heightened efficiency, sustainability, and performance. As the industry continues to evolve, the spotlight on electric drivetrains, inventive transmission solutions, and seamless integration with cutting-edge technologies will undeniably chart the course of this pivotal automotive segment.

## Key Market Drivers

### Electrification and Hybridization

The growing urgency to mitigate climate change and reduce emissions has led to a monumental shift towards electrification and hybridization. Governments worldwide are introducing stringent emissions standards and offering incentives to promote electric vehicles (EVs). This driver has led to a surge in research and development of electric drivetrain components, including batteries, electric motors, power electronics, and charging infrastructure. The automotive industry is transitioning towards EVs as a strategic response to this driver, significantly impacting drivetrain technology.

### Enhanced Fuel Efficiency

Consumers' demand for vehicles with improved fuel efficiency remains a paramount driver for the automotive industry. This factor has spurred continuous advancements in transmission technologies, such as CVTs and DCTs, that optimize power delivery and fuel consumption. Automakers are increasingly integrating advanced gearbox designs, multi-speed transmissions, and regenerative braking systems within drivetrain configurations to achieve higher efficiency levels.

### Autonomous and Connected Vehicles

The evolution of autonomous and connected vehicles is driving a convergence between drivetrain technology and cutting-edge sensors, AI algorithms, and communication systems. Autonomous vehicles require drivetrain systems that seamlessly interact with advanced driver assistance systems (ADAS), enabling precise control and coordination. Moreover, connected vehicles demand real-time communication between drivetrain components and external infrastructure for optimal performance and safety.

## Regulatory Compliance

Governments' steadfast commitment to enforcing stringent emission standards and safety regulations compels automakers to engineer drivetrain systems that align with these mandates. Internal combustion engine technologies are continually refined to meet ever-tightening emission norms, while electric components are integrated to reduce overall fleet emissions. Drivetrain technologies that offer improved energy efficiency, reduced emissions, and enhanced safety features are central to addressing this driver.

## Performance and Vehicle Dynamics

Consumer expectations for enhanced vehicle performance, handling, and driving dynamics persistently drive innovation in drivetrain technology. Advanced drivetrain systems, including torque vectoring and adaptive all-wheel-drive configurations, enable automakers to deliver vehicles with superior acceleration, cornering capabilities, and stability control. This driver underscores the importance of optimizing power distribution across various terrains and driving conditions. Consumers' expectations for performance remain high, even in the context of electric vehicles. High-performance electric cars often feature advanced drivetrain components, such as powerful electric motors, sophisticated torque vectoring systems, and advanced traction control systems. Cost-effective drivetrain technology is crucial for automakers to remain competitive.

Innovations in manufacturing processes, materials, and supply chain management help reduce production costs while maintaining or improving performance

the Global Automotive Drivetrain Technology Market is navigating a transformative landscape shaped by the forces of electrification, efficiency, autonomy, regulation, and performance. Manufacturers and industry stakeholders are collaboratively addressing these drivers through innovations that encompass electric drivetrains, advanced transmissions, connectivity integration, compliance measures, and dynamic handling solutions, ensuring a resilient and forward-looking industry outlook.

## Key Market Challenges

### Electrification Transition Concerns a Significant Obstacle To Market Expansion

The shift towards electrification, while promising reduced emissions and enhanced efficiency, presents a series of hurdles. Developing advanced electric drivetrains

necessitates overcoming technical challenges such as achieving optimal energy storage in batteries, enhancing charging infrastructure to address range anxiety, and managing the disposal and recycling of batteries responsibly.

### Integration of Advanced Technologies

As drivetrain technology converges with autonomous driving and connectivity, the seamless integration of various components becomes crucial. Creating drivetrains that effectively communicate with AI algorithms, sensors, and interconnected systems requires meticulous coordination to ensure safety, reliability, and compatibility.

### Regulatory Complexity

The Global Automotive Drivetrain Technology Market operates within a complex regulatory landscape. Meeting stringent emissions standards across different regions poses a challenge, as each region may have distinct requirements. Adhering to these regulations while maintaining innovation requires substantial investment and careful design considerations.

### Supply Chain Disruptions

The automotive industry's reliance on a global supply chain exposes it to disruptions, as seen during the COVID-19 pandemic. Ensuring supply chain resilience is vital to prevent production delays due to component shortages. Diversifying sourcing strategies, localizing production when feasible, and maintaining contingency plans are essential to mitigate these risks.

### Cost and Consumer Acceptance

Developing advanced drivetrain technologies often entails higher research, development, and production costs. Balancing these increased costs with consumer acceptance and willingness to pay for cutting-edge features can be challenging. Manufacturers need to demonstrate the long-term benefits of innovative drivetrains while addressing potential price concerns.

### Durability and Reliability

Drivetrain components must endure varying road conditions, climates, and driving habits. Ensuring the durability and reliability of drivetrain systems is paramount to avoid

safety risks and costly recalls. This challenge requires rigorous testing, quality control, and continuous monitoring of component performance.

## Scalability and Manufacturing

As new drivetrain technologies emerge, manufacturers need to ensure that their production processes are scalable and adaptable. Switching from traditional drivetrains to electric or hybrid systems may require changes in manufacturing facilities, workforce training, and supply chain logistics

the Global Automotive Drivetrain Technology Market faces a complex interplay of challenges spanning technical innovation, regulatory compliance, supply chain resilience, consumer adoption, durability, and manufacturing scalability. Overcoming these challenges requires a collaborative effort among manufacturers, suppliers, policymakers, and technology developers to foster a future where drivetrain technology evolves sustainably, efficiently, and in line with the ever-changing demands of the automotive landscape.

## Key Market Trends

### Electrification Revolution

The shift towards electrification is a prominent trend in the automotive drivetrain sector. Electric vehicles (EVs) and hybrid models are gaining traction as automakers prioritize sustainability and emission reduction. This trend encompasses advancements in electric drivetrains, battery technology, and charging infrastructure, propelling the industry towards a cleaner and greener future.

### Autonomous Driving Integration

The integration of autonomous driving technology is significantly impacting drivetrain development. Drivetrain systems are evolving to seamlessly interact with advanced driver assistance systems (ADAS) and self-driving algorithms. This trend calls for drivetrains that can adapt to varying levels of autonomy, optimizing performance and safety in different scenarios.

### Connectivity and Communication

The rise of connected vehicles is transforming drivetrain technology. Drivetrains are

becoming integral components of the vehicle's communication network, interacting with sensors, cameras, and other systems to enhance vehicle performance, safety, and user experience. This trend enables real-time data exchange for predictive maintenance, navigation, and optimized power delivery.

### Lightweighting and Efficiency

Enhancing fuel efficiency remains a significant trend in drivetrain technology. Automakers are adopting lightweight materials and innovative transmission technologies to reduce overall vehicle weight and boost efficiency. Trends like downsizing engines, improving aerodynamics, and utilizing regenerative braking contribute to optimizing energy consumption and reducing emissions.

### Modularization and Scalability

Modular drivetrain platforms are gaining traction due to their scalability and adaptability. These platforms enable automakers to develop various vehicle models using common drivetrain components. This trend enhances efficiency in production, reduces costs, and accelerates time-to-market for new vehicle models, fostering innovation and competitiveness.

### Electrified All-Wheel Drive (eAWD)

The demand for improved traction, stability, and performance is driving the adoption of electrified all-wheel drive systems. These systems combine electric motors with traditional powertrains to provide torque-vectoring capabilities, enhancing vehicle dynamics and handling in various conditions.

### Continuous Transmission Innovation

Traditional transmissions are evolving to meet diverse demands. Continuously variable transmissions (CVTs) are becoming more sophisticated, providing seamless power delivery and fuel efficiency. Dual-clutch transmissions (DCTs) offer quick gear shifts, contributing to enhanced performance and driving pleasure.

The Global Automotive Drivetrain Technology Market is experiencing a paradigm shift driven by electrification, autonomous integration, connectivity, lightweighting, and modularization. These trends reflect the industry's commitment to sustainability, safety, efficiency, and customer-centric innovation, paving the way for a dynamic future where

drivetrains play a central role in defining the next generation of vehicles.

## Segmental Insights

Conventional drivetrains encompass traditional internal combustion engines (ICE) paired with manual or automatic transmissions. While they are gradually sharing the spotlight with electrification, they continue to be a significant segment. Innovations in internal combustion engines, such as downsizing and turbocharging, aim to enhance fuel efficiency and reduce emissions. The development of advanced transmissions, including automated manual transmissions (AMTs) and advanced torque converters, contributes to smoother power delivery and improved driving experiences. The surge in electric vehicle (EV) adoption has led to the emergence of electric drivetrains as a vital segment. This encompasses electric motors, power electronics, and battery systems. Innovations focus on maximizing power density, extending battery range, and optimizing energy conversion efficiency. The development of electric drivetrain platforms that suit various Vehicle Types, from compact city cars to high-performance sports cars, reflects the versatility and rapid advancements in this segment.

Hybrid drivetrains combine internal combustion engines with electric propulsion systems. This segment includes mild hybrids, full hybrids, and plug-in hybrids. Manufacturers are refining hybrid powertrains to offer seamless transitions between electric and internal combustion modes, improving fuel efficiency and lowering emissions. Advanced regenerative braking systems and energy management strategies are being implemented to enhance overall efficiency. The AWD and 4WD segment is focused on enhancing vehicle traction, stability, and off-road capabilities. Innovations include electronically controlled torque distribution systems that can adapt to different road conditions. Drivetrain technology enables power to be distributed dynamically between the front and rear wheels, or even between individual wheels, to optimize vehicle handling and performance.

Within the transmission segment, CVTs and DCTs are gaining prominence due to their impact on efficiency and driving dynamics. CVTs offer seamless gear changes, ensuring the engine operates at its most efficient point. DCTs provide rapid gear shifts and enhance driving engagement. Both technologies play a pivotal role in improving fuel economy while providing diverse driving experiences. Emerging trends, such as autonomous driving and connectivity, are driving the development of drivetrain technologies that align with these advancements. Drivetrains need to integrate seamlessly with autonomous systems, providing precise control and response in various driving scenarios. Connectivity-enabled drivetrains can receive real-time data to



optimize power distribution and enhance energy efficiency based on traffic conditions and road profiles.

## Regional Insights

North America is characterized by its diverse vehicle preferences, encompassing a wide range of SUVs, trucks, and passenger cars. The region's automotive landscape places a significant emphasis on high-performance vehicles, driving demand for advanced drivetrain technologies that enhance power and torque delivery. Hybridization and electrification efforts are driven by stringent emission regulations and the growing interest in sustainable mobility. Additionally, North American manufacturers are investing in transmission innovations to improve fuel efficiency and deliver smoother driving experiences.

Europe's automotive market showcases a unique blend of luxury, performance, and environmental consciousness. The region is a hub for premium and luxury vehicle brands that emphasize cutting-edge drivetrain technologies. Europe leads in the adoption of electric vehicles, driving advancements in electric drivetrains and battery technology. Stricter emissions regulations encourage manufacturers to explore hybridization and electrification solutions to meet sustainability goals. The prominence of manual transmissions persists in Europe, although automatic transmissions and dual-clutch transmissions (DCTs) are also popular.

The Asia-Pacific region, including China, Japan, and South Korea, is at the forefront of automotive innovation and production. Rapid urbanization, a growing middle class, and government incentives drive automotive sales, prompting a surge in demand for drivetrain technology. Asia-Pacific leads in electric vehicle adoption, with China being the world's largest EV market. This trend fuels innovations in electric drivetrains, battery technology, and charging infrastructure. Additionally, the region's dominance in manufacturing results in significant advancements in transmission technology and supply chain efficiency.

The Middle East and Africa region showcases a preference for high-performance vehicles and off-road capabilities due to rugged terrains. Drivetrain technology often emphasizes durability, torque, and four-wheel drive systems to tackle challenging landscapes. As electric vehicle adoption increases globally, the region's interest in luxury vehicles, as well as its oil-rich economies, may lead to the exploration of hybrid and electric drivetrain technologies in the luxury vehicle segment.

South America's automotive market exhibits diverse preferences influenced by economic conditions and consumer demands. Cost-effective solutions are vital, driving demand for drivetrain technologies that optimize fuel efficiency and offer affordability. The region's unique terrain calls for robust drivetrains capable of handling varied road conditions. While electrification is gaining attention, conventional internal combustion engines with manual transmissions remain prevalent due to their reliability and affordability.

## Key Market Players

Gkn Plc

Dana Incorporated

Borgwarner Inc.

Nidec Corporation

Zf Friedrichshafen Ag

Avl List Gmbh

Axletech International

Continental Ag

Schaeffler Technologies Ag & Co. Kg

Robert Bosch Gmbh.

## Report Scope

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

Automotive Drivetrain Technology Market By Vehicle Type:

Passenger Car

Buses

Trucks

Automotive Drivetrain Technology Market, By Technology:

Central Motor

E-axle

Wheel Hub Module

Automotive Drivetrain Technology Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

South Korea

Australia

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Drivetrain Technology Market.

Available Customizations:

*Automotive Drivetrain Technology Market - Global Industry Size, Share, Trends Opportunity, and Forecast 2018-2...*

Global Automotive Drivetrain Technology 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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- 11.2. Weakness
- 11.3. Opportunities
- 11.4. Threats

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- 14.1.1.2. Product & Services
- 14.1.1.3. Financials (As Per Availability)
- 14.1.1.4. Recent Developments
- 14.1.1.5. Key Management Personnel

#### 14.1.2. Dana Incorporated

- 14.1.2.1. Company Details
- 14.1.2.2. Product & Services
- 14.1.2.3. Financials (As Per Availability)
- 14.1.2.4. Recent Developments
- 14.1.2.5. Key Management Personnel

#### 14.1.3. Borgwarner Inc.

- 14.1.3.1. Company Details
- 14.1.3.2. Product & Services
- 14.1.3.3. Financials (As Per Availability)
- 14.1.3.4. Recent Developments
- 14.1.3.5. Key Management Personnel

#### 14.1.4. Nidec Corporation

- 14.1.4.1. Company Details
- 14.1.4.2. Product & Services
- 14.1.4.3. Financials (As Per Availability)
- 14.1.4.4. Recent Developments
- 14.1.4.5. Key Management Personnel

#### 14.1.5. Zf Friedrichshafen Ag

- 14.1.5.1. Company Details
- 14.1.5.2. Product & Services
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- 14.1.5.4. Recent Developments
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## **15. STRATEGIC RECOMMENDATIONS**

### 15.1. Key Focus Areas

15.1.1. Target Regions & Countries

15.1.2. Target By Vehicle Type

15.1.3. Target Technology

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