

# **Automotive Medium & Heavy Commercial Vehicle 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, 2018-2028**

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## **Abstracts**

Global Automotive Medium & Heavy Commercial Vehicle Clutch Plate Market has valued at USD 2.5 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.4% through 2028. The Global Automotive Medium and Heavy Commercial Vehicle Automotive Clutch Plate industry is a vital component of the commercial vehicle sector, playing a pivotal role in ensuring the smooth operation and performance of medium and heavy-duty vehicles. Clutch plates are essential for facilitating the engagement and disengagement of the engine from the transmission, enabling seamless gear changes and efficient power transfer. As the demand for medium and heavy commercial vehicles continues to rise globally due to factors such as economic growth, urbanization, infrastructure development, and the expansion of e-commerce and logistics, the market for clutch plates remains robust.

### **Key Market Drivers**

#### **Rising Demand for Commercial Vehicles**

The demand for medium and heavy commercial vehicles (MHCVs) is a primary driver for the market of automotive clutch plates. Commercial vehicles play a crucial role in various industries, including transportation, logistics, construction, and agriculture.

Several factors contribute to the increasing demand for MHCVs. Economic expansion, particularly in emerging markets, has led to increased trade and industrial activities, boosting the need for commercial vehicles to transport goods and materials. Rapid urbanization has driven up the demand for MHCVs, as cities require efficient transportation for people and goods. Commercial vehicles are essential for urban logistics and construction projects. Many governments are investing heavily in infrastructure development, including roads, highways, and public transportation systems. These projects often involve the use of heavy machinery and commercial vehicles, spurring demand for clutch plates. The growth of e-commerce has created a surge in the demand for delivery and logistics services. Companies in the e-commerce sector heavily rely on commercial vehicles for last-mile delivery, further driving MHCV sales. As the number of MHCVs on the road continues to rise, so does the demand for robust and reliable clutch plates to ensure smooth operation and safety.

### Stringent Emission Regulations and Fuel Efficiency

Environmental concerns and the need to reduce greenhouse gas emissions have led to the implementation of stringent emission regulations worldwide. MHCV manufacturers are under pressure to produce vehicles that are more fuel-efficient and have lower emissions. This has a direct impact on the design and technology of automotive clutch plates. To improve fuel efficiency, MHCVs are increasingly equipped with advanced transmission systems, such as automated manual transmissions (AMTs) and dual-clutch transmissions (DCTs). These transmissions require specialized clutch plates designed for seamless integration and enhanced efficiency. Clutch plates made from lightweight materials contribute to overall vehicle weight reduction, which is crucial for improving fuel economy. Manufacturers are constantly researching and developing new materials that offer the necessary durability while reducing weight. Clutch plates play a role in controlling emissions by enabling smooth gear changes and efficient power transfer. Meeting emission standards often requires precision engineering and materials that can withstand high temperatures and friction without degradation. In this context, clutch plate manufacturers need to innovate and adapt to produce components that align with the latest emission regulations and fuel efficiency standards.

### Technological Advancements in Clutch Plate Materials

The materials used in manufacturing clutch plates have seen significant advancements over the years. Traditionally, asbestos was a common material, but due to health and environmental concerns, asbestos has been phased out in favor of alternative materials. These modern materials offer several advantages. Organic materials, such as non-

asbestos organic (NAO) compounds, are commonly used in clutch plates due to their smooth engagement and disengagement, low noise, and resistance to fading under heavy use. Ceramic clutch plates are known for their high-temperature resistance and durability. They are often used in high-performance and heavy-duty applications where extreme heat is generated. Carbon composite materials are lightweight and provide excellent heat dissipation properties. They are suitable for high-performance and racing applications. Sintered clutch plates use a powder metallurgy process to create a dense and durable friction surface. They are favored in heavy-duty and industrial applications. Advancements in material science have led to the development of hybrid and composite materials that offer the best of multiple worlds, such as improved durability, heat resistance, and performance. These innovations have enabled clutch plate manufacturers to tailor their products to specific vehicle types and applications.

### Maintenance and Replacement Needs

The commercial vehicle industry is characterized by vehicles that endure high levels of stress due to heavy loads, frequent start-stop operations, and long hours on the road. As a result, clutch components, including the clutch plate, undergo wear and tear. This continuous wear necessitates regular maintenance and periodic replacement: Fleet operators and truck owners invest in maintenance services to ensure the proper functioning of their vehicles. Routine inspections and adjustments of clutch systems are essential to prevent breakdowns and costly repairs. The replacement market for clutch plates is significant, as commercial vehicles require periodic clutch plate replacements throughout their lifecycle. This replacement market offers a consistent source of revenue for clutch plate manufacturers and suppliers. Minimizing downtime is crucial for fleet operators, as any vehicle off the road results in revenue loss. Therefore, the availability of reliable clutch plates and efficient replacement services is highly valued in the commercial vehicle sector. Effective marketing strategies, distribution networks, and aftermarket support are essential for clutch plate manufacturers to tap into the replacement market and meet the maintenance needs of commercial vehicle operators.

### Global Expansion of E-commerce and Logistics

The global expansion of e-commerce has transformed the logistics and transportation industry. E-commerce companies, delivery services, and logistics providers rely heavily on medium and heavy commercial vehicles for timely deliveries. This trend has been further accelerated by the COVID-19 pandemic. E-commerce companies require medium-sized delivery trucks for last-mile delivery to customers' homes. The constant stop-and-go nature of these operations places additional stress on clutch systems. E-

commerce businesses operate large warehouses and distribution centers, necessitating the use of heavy commercial vehicles for moving goods within these facilities. The pandemic led to a surge in online shopping, as consumers shifted to e-commerce for safety reasons. This increased demand for MHCVs used in the e-commerce supply chain. E-commerce companies often expand their operations globally, requiring a fleet of commercial vehicles in various regions. This drives the demand for clutch plates in different parts of the world. As e-commerce continues to grow and evolve, the commercial vehicle sector will remain a key driver for clutch plate manufacturers. Meeting the specific requirements of e-commerce logistics, such as durability and efficiency, is vital for clutch plate suppliers targeting this market.

## Key Market Challenges

### Stringent Emission Regulations and Fuel Efficiency Requirements

One of the most prominent challenges facing the automotive clutch plate industry for MHCVs is the growing stringency of emission regulations and the demand for improved fuel efficiency. Governments worldwide are implementing strict emission standards to address air pollution and reduce greenhouse gas emissions. These regulations, such as Euro 6 in Europe and EPA standards in the United States, have a direct impact on vehicle design, including transmission systems and clutch plates. Meeting these emission standards requires MHCV manufacturers to invest in advanced technologies, including automated manual transmissions (AMTs) and dual-clutch transmissions (DCTs). These advanced transmissions demand specialized clutch plates designed to handle higher torque loads and operate with precision to reduce emissions. A key aspect of addressing this challenge involves the reduction of friction during clutch engagement and disengagement. This is essential for enhancing fuel efficiency, but it must be achieved without compromising durability. Additionally, clutch plate manufacturers must develop materials that can withstand the high heat generated during clutch engagement without degradation while ensuring compliance with environmental standards and regulations.

### Rapid Technological Advancements in Transmission Systems

The automotive industry is undergoing rapid technological advancements in transmission systems, including a shift toward more efficient and automated solutions. While these advancements offer benefits such as improved fuel efficiency and performance, they simultaneously pose significant challenges for clutch plate manufacturers. As MHCV manufacturers increasingly adopt automated manual

transmissions (AMTs) and dual-clutch transmissions (DCTs), clutch plates must be designed to integrate seamlessly with these advanced transmission systems. This integration includes ensuring compatibility with electronic control systems, sensors, and diagnostic systems that can detect clutch-related issues. The complexity of modern transmission systems and their diagnostic capabilities means that clutch plates must meet exceptionally high-quality standards. They are less forgiving of imperfections, putting additional pressure on manufacturers to deliver flawless components.

### Intense Market Competition and Price Pressure

The global market for automotive clutch plates is characterized by intense competition, with numerous manufacturers and suppliers vying for contracts with MHCV manufacturers. This intense competition can lead to significant price pressure, which, if not managed effectively, can impact profitability and product quality. Price wars are not uncommon in this highly competitive market, as manufacturers engage in aggressive pricing strategies to secure contracts. This can result in lower profit margins, making it challenging for manufacturers to invest in research and development for innovative clutch plate materials and technologies. MHCV manufacturers often seek cost reduction throughout their supply chain, which can lead to demands for lower-priced clutch plates. This places considerable pressure on suppliers to reduce costs without compromising quality, which can be a delicate balance to strike. Furthermore, MHCV manufacturers may source clutch plates globally, seeking the most cost-effective suppliers. This can result in increased competition for contracts and heightened price sensitivity among suppliers.

### Evolving Material Regulations and Sustainability

The automotive industry faces evolving regulations regarding materials used in vehicle components, including clutch plates. Sustainability and environmental concerns are driving changes in material choices, which can be challenging for manufacturers. Material restrictions imposed by governments and international bodies require clutch plate manufacturers to continually monitor and adapt to these evolving regulations. Some materials, particularly those that are harmful to human health or the environment, may be restricted or banned. The industry is increasingly focused on recyclability and sustainable materials. This means that manufacturers may need to invest in research and development to develop clutch plates that meet these criteria. Such materials must not only perform well in terms of durability and reliability but also align with sustainability goals. Global variations in material regulations can complicate production and distribution processes. Different regions may have varying material regulations and

sustainability standards, making it challenging to produce standardized clutch plates for global markets. Suppliers may need to develop region-specific solutions to remain compliant.

### Supply Chain Disruptions and Component Shortages

The global automotive industry, including the clutch plate sector, faces recurring supply chain disruptions and component shortages. These disruptions can result from various factors, including geopolitical tensions, natural disasters, and the COVID-19 pandemic. Many clutch plate manufacturers rely on complex global supply chains for materials and components. Disruptions in one part of the supply chain, such as material shortages or transportation delays, can ripple through and impact production schedules. Shortages of critical components, such as specialized friction materials used in clutch plates, can lead to delays in production. These shortages may be caused by factors such as increased demand, production interruptions at supplier factories, or logistic challenges in the transportation of components. Transportation and logistics disruptions can further exacerbate the problem, affecting the timely delivery of clutch plates to MHCV manufacturers. These disruptions can result from various factors, including port closures, trade disputes, and unforeseen logistical challenges. Maintaining an optimal balance of inventory is a continuous challenge for clutch plate manufacturers. Overstocking can tie up capital and increase holding costs, while understocking can lead to production stoppages and missed delivery deadlines. Striking the right balance is essential to manage supply chain disruptions effectively.

### Key Market Trends

#### Adoption of Advanced Transmission Technologies

The automotive industry is witnessing a significant trend toward the adoption of advanced transmission technologies in MHCVs. As environmental regulations become more stringent, manufacturers are increasingly turning to automated manual transmissions (AMTs) and dual-clutch transmissions (DCTs) to improve fuel efficiency and reduce emissions. This transition has a direct impact on the design and performance requirements of clutch plates. AMTs, which combine the convenience of automatic transmissions with the efficiency of manual transmissions, are gaining popularity in MHCVs. DCTs, known for their lightning-fast gear shifts, are also being integrated into the medium and heavy commercial vehicle segment. Both of these transmission types require specialized clutch plates that can handle the unique demands of automated shifting, precise control, and rapid engagement. Moreover,

AMTs and DCTs are often accompanied by advanced electronic control systems that optimize gear changes for fuel efficiency and performance. These systems rely on precise clutch engagement, placing a premium on the quality and reliability of clutch plates. As this trend continues, clutch plate manufacturers are focusing on developing products that can seamlessly integrate with these advanced transmission technologies.

### Lightweight Clutch Plate Materials for Improved Fuel Efficiency

Another noteworthy trend in the MHCV clutch plate market is the pursuit of lightweight materials to enhance overall vehicle fuel efficiency. Reducing the weight of clutch components contributes to lower fuel consumption and improved vehicle handling. Clutch plates traditionally featured steel or iron components, which added significant weight to the overall clutch assembly. However, modern manufacturing techniques and material advancements have allowed for the development of clutch plates with lightweight materials. These materials offer the necessary strength and durability while significantly reducing the weight of the clutch assembly. Lightweight clutch plates not only contribute to better fuel efficiency but also reduce wear and tear on the transmission system. This trend aligns with the industry's broader focus on achieving better fuel economy and reducing the environmental footprint of MHCVs.

### Enhanced Durability and Longevity

As MHCVs continue to handle heavy loads and endure long hours on the road, there is a growing emphasis on improving the durability and longevity of clutch plates. The commercial vehicle sector relies heavily on dependable clutch systems to minimize downtime and ensure operational efficiency. Manufacturers are investing in research and development to create clutch plates that can withstand the rigors of commercial vehicle use. This includes materials engineered for high-temperature resistance and friction properties that can endure extended use without fading or degrading. These enhancements are particularly crucial for industries like logistics, construction, and agriculture, where MHCVs are subjected to demanding operating conditions. Moreover, the development of clutch plates that require less frequent maintenance and replacement is a significant trend. Fleet operators and commercial vehicle owners seek clutch systems that can deliver extended service intervals, reducing operational costs and downtime. Manufacturers are responding by designing clutch plates that offer superior longevity, ultimately benefiting the overall lifecycle cost of MHCVs.

### Sustainable Manufacturing and Materials

Environmental sustainability has become a pivotal trend in the automotive industry, including the production of clutch plates. There is a growing awareness of the environmental impact associated with vehicle manufacturing, and manufacturers are striving to minimize their carbon footprint. This trend extends to clutch plate production, where efforts are being made to adopt sustainable manufacturing practices and source environmentally friendly materials. Manufacturers are increasingly focusing on using materials that are free from harmful substances and comply with environmental regulations. This includes replacing traditional friction materials, such as asbestos, with eco-friendly alternatives like organic and ceramic compounds. Additionally, manufacturers are implementing sustainable manufacturing processes that reduce energy consumption and waste generation. These initiatives not only align with environmental goals but also resonate with customers and MHCV manufacturers seeking eco-friendly solutions throughout the supply chain.

### Customization and Application-Specific Solutions

The MHCV market is diverse, encompassing various vehicle types and applications, from long-haul freight transport to construction and mining. As a result, there is a growing trend towards customization and application-specific solutions in clutch plate manufacturing. MHCV manufacturers and fleet operators are increasingly seeking clutch plates tailored to their specific needs and operating conditions. Customization can involve the selection of friction materials optimized for heavy-duty applications or the development of clutch plates designed for specialized vehicles, such as those used in off-road construction. The demand for application-specific solutions extends beyond traditional clutch plates. For instance, industries like agriculture may require clutch plates designed to handle the unique demands of tractors and farm machinery. This trend emphasizes the importance of flexibility and adaptability in clutch plate manufacturing, allowing suppliers to cater to a wide range of customer requirements.

### Segmental Insights

#### Type Analysis

The Clutch Plate Market is strategically divided into four segments based on clutch plate size, namely: below 9 inches, between 9.1 and 10 inches, between 10.1 and 11 inches, and above 11 inches. Notably, the segment covering clutch disc sizes between 10 and 11 inches is expected to dominate during the forecast or projection period. This heightened growth can be attributed to the surging demand for electric vehicles (EVs) in the automotive industry. As the market witnesses a notable shift towards cleaner and



more sustainable transportation solutions, there is a growing need for efficient and reliable clutch components within the 10 to 11-inch size range. This increasing interest in EVs is significantly driving the growth prospects of the Clutch Plate market.

### Demand Category Analysis

The automotive clutch plate market is segmented into two primary sales channels: original equipment manufacturer (OEM) and aftermarket. OEM sales account for clutch plates supplied directly to automobile manufacturers for installation in new vehicles during the production process. OEMs often require customized clutch plates tailored to their specific vehicle models, making this segment highly competitive. The aftermarket segment includes clutch plates sold to repair and maintenance service providers as replacement parts for existing vehicles. These clutch plates need to meet the performance standards of the original equipment to ensure safe and efficient operation. The aftermarket segment benefits from the continuous need for clutch plate replacements as vehicles age and undergo wear and tear.

### Regional Insights

In comparison to all other regions, Asia-Pacific has the greatest market share, which can be due to the rising demand for vehicles in developing nations like China and India. Additionally, one of the factors influencing the market's growth is the presence of a sizable number of manual transmission vehicles in south-east Asia. The market's second-largest region, Europe, is expected to continue to expand gradually over the course of the projection period. The market is anticipated to expand as a result of factors including rising premium automobile demand, the adoption of practical powertrain systems in the vehicles, and investments made by significant market players.

During the projected period, North America is anticipated to grow quickly and hold a significant market share. The market is expected to grow as a result of factors including the rise in demand and quick adoption of electric vehicles in nations like the USA and Canada with an established automotive infrastructure in the region.

### 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 Medium & Heavy Commercial Vehicle Clutch Plate Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Medium & Heavy Commercial Vehicle Clutch Plate Market, By Type:

Less than 9 inches

9.1 to 10 inches

10.1 to 11 inches

More than 11 inches

Automotive Medium & Heavy Commercial Vehicle Clutch Plate Market, By Demand Category:

OEM

Aftermarket

## Automotive Medium & Heavy Commercial Vehicle Clutch Plate Market, By Region:

### North America

United States

Canada

Mexico

### Europe & CIS

France

Russia

United Kingdom

Italy

Germany

Spain

Belgium

### Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Medium & Heavy Commercial Vehicle Clutch Plate Market.

## Available Customizations:

Global Automotive Medium & Heavy Commercial Vehicle Clutch Plate market report with the given market data, Tech Sci 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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