

Commercial Vehicle Powertrain Systems Market – Global Industry Size, Share, Trends Opportunity, and Forecast, Segmented By Drive Type (Front-Wheel Drive, Rear-Wheel Drive, and All-Wheel Drive), By Component Type (Engine, Transmission, Differentials, and Driveshaft), By Vehicle Type (LCV, M&HCV), By Region, Competition, 2018-2028

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Abstracts

The Global Commercial Vehicle Powertrain Systems Market size reached USD 267.21 billion in 2022 and is expected to grow with a CAGR of 5.68% in the forecast period.

The Global Commercial Vehicle Powertrain Systems Market is a critical segment of the automotive industry, encompassing a wide range of components and technologies designed to power commercial vehicles efficiently and sustainably. This market plays a pivotal role in addressing the growing demands for cleaner emissions, fuel efficiency, and enhanced performance across various commercial vehicle segments.

One of the primary drivers of this market is the global emphasis on reducing emissions and achieving environmental sustainability. Stringent emissions regulations in major regions, including North America, Europe, and Asia, compel commercial vehicle manufacturers to adopt advanced powertrain systems. These systems incorporate technologies like selective catalytic reduction (SCR), exhaust gas recirculation (EGR), and clean diesel engines to minimize harmful pollutants and meet emissions standards. Additionally, the market is witnessing a shift towards electric and hybrid powertrains to further reduce carbon footprints, especially in urban transport and last-mile delivery applications.

Fuel efficiency is another key driver fueling innovation in the Commercial Vehicle Powertrain Systems Market. Rising fuel costs and the need to optimize operational costs drive commercial vehicle operators to seek powertrain solutions that enhance fuel economy. Advanced transmission systems, lightweight materials, and aerodynamic designs are integrated into powertrain systems to achieve higher fuel efficiency, ensuring the economic viability of commercial fleets.

Furthermore, the market is marked by a growing focus on enhancing overall vehicle performance. Commercial vehicle powertrain systems are not only expected to meet emission and fuel efficiency targets but also deliver robust and reliable performance in diverse applications. As a result, manufacturers are investing in research and development to develop powertrains that offer both efficiency and durability.

In summary, the Global Commercial Vehicle Powertrain Systems Market is driven by the imperative to reduce emissions, improve fuel efficiency, and enhance overall vehicle performance. This market is at the forefront of technological advancements, with a strong emphasis on sustainable solutions to meet the evolving needs of the commercial vehicle industry worldwide.

Key Market Drivers

Stringent Emissions Regulations

One of the most prominent drivers is the increasing stringency of emissions regulations worldwide. Governments and environmental agencies in regions like North America, Europe, and Asia are imposing strict limits on pollutants from commercial vehicles. This necessitates the adoption of advanced powertrain systems that can effectively reduce emissions and help manufacturers meet these standards.

Fuel Efficiency Demands

Escalating fuel costs and a growing focus on operational cost reduction are driving the demand for more fuel-efficient commercial vehicles. Powertrain systems are evolving to incorporate technologies such as turbocharging, direct injection, and hybridization to boost fuel economy and minimize the overall operating expenses for fleet operators.

Shift Towards Electrification

The global push for cleaner energy sources has led to a significant shift towards electric

and hybrid powertrains in the commercial vehicle segment. The adoption of electric buses, trucks, and vans is accelerating, driven by environmental concerns, government incentives, and the need to reduce the carbon footprint of commercial transportation.

Urbanization and Last-Mile Delivery

With the increasing trend of urbanization, last-mile delivery services have gained prominence. This has created a demand for compact, efficient, and environmentally friendly commercial vehicles, spurring innovation in powertrain systems tailored for urban logistics.

Technological Advancements

Ongoing advancements in powertrain technologies are enhancing their performance and reliability. These innovations include more sophisticated transmissions, predictive maintenance systems, and telematics that contribute to better vehicle performance, fuel efficiency, and reduced downtime.

Global Trade and Logistics

The growth of global trade and logistics necessitates more powerful and efficient commercial vehicles. Powertrain systems are evolving to meet the demands of long-haul transportation, including the development of high-torque engines and advanced transmission systems.

Government Incentives

Governments in various countries are incentivizing the adoption of cleaner and more efficient commercial vehicles. These incentives may come in the form of tax breaks, subsidies, or grants, encouraging fleet operators to invest in vehicles equipped with advanced powertrain systems.

Safety and Connectivity

Powertrain systems are increasingly integrated with safety and connectivity features. This includes technologies like adaptive cruise control, lane-keeping assistance, and vehicle-to-vehicle communication systems, enhancing not only the vehicle's performance but also its safety and efficiency.

In conclusion, the Global Commercial Vehicle Powertrain Systems Market is experiencing a transformative phase driven by the convergence of emissions regulations, fuel efficiency demands, electrification, and technological innovations. These factors collectively underscore the industry's commitment to sustainability, efficiency, and improved performance in commercial transportation.

Key Market Challenges

Evolving Emissions Standards

The constant evolution of emissions standards presents a significant challenge. As governments worldwide tighten emissions regulations, commercial vehicle manufacturers must invest heavily in research and development to develop powertrain systems that comply with these stringent standards while remaining cost-effective.

High Development Costs

The development of advanced powertrain systems requires substantial investments in research, testing, and innovation. Manufacturers must balance the need for cutting-edge technology with the cost-effectiveness demanded by commercial vehicle operators.

Electric Vehicle Infrastructure

While electric and hybrid powertrains are gaining traction, the lack of adequate charging infrastructure remains a challenge. Establishing a comprehensive network of charging stations is essential for the widespread adoption of electric commercial vehicles.

Battery Technology

For electric vehicles, the limitations of current battery technology, including range anxiety and charging times, pose hurdles to widespread adoption. Developing more efficient and cost-effective batteries is crucial to overcoming these challenges.

Global Supply Chain Disruptions

Recent disruptions in global supply chains, such as those caused by the COVID-19 pandemic, have impacted the availability of essential components for powertrain systems. Managing these disruptions while maintaining production schedules is a

challenge for manufacturers.

Transition Period

The shift from traditional internal combustion engines to electric and hybrid powertrains presents a transition period during which manufacturers must manage both technologies simultaneously. This dual focus can strain resources and present logistical challenges.

Regulatory Variability

Variances in emissions regulations from one region to another can make it challenging for manufacturers to develop standardized powertrain systems. Customization is often required to meet different regulatory requirements, increasing complexity and costs.

Consumer Acceptance

For electric and hybrid commercial vehicles to gain broader acceptance, there needs to be increased awareness and education among commercial fleet operators and consumers. Overcoming skepticism and demonstrating the long-term benefits of these technologies is a persistent challenge.

In summary, the Global Commercial Vehicle Powertrain Systems Market grapples with a range of challenges, from regulatory complexities and high development costs to the need for infrastructure and consumer acceptance. Successfully navigating these challenges is essential for the industry's continued growth and adaptation to evolving market demands.

Key Market Trends

Autonomous Technologies

The commercial vehicle industry is experiencing a growing interest in autonomous technologies. Advanced driver assistance systems (ADAS) and self-driving capabilities are being integrated into powertrain systems to enhance safety and efficiency. Features like adaptive cruise control, lane-keeping assistance, and automated braking systems are becoming standard in many commercial vehicles.

Fuel Cell Electric Vehicles (FCEVs)

Fuel cell technology is gaining attention as an alternative to battery-electric vehicles (BEVs). FCEVs use hydrogen to generate electricity and have longer ranges than pure BEVs. Powertrain systems for FCEVs are being developed to cater to specific commercial applications, such as long-haul trucking and buses.

Remote Diagnostics

Remote diagnostic capabilities are becoming a crucial part of powertrain systems. Manufacturers are equipping vehicles with remote monitoring and diagnostics tools, allowing fleet managers to track vehicle health and address issues proactively. This trend reduces unplanned downtime and enhances overall operational efficiency.

Alternative Fuels

Beyond electrification, commercial vehicles are exploring a wider range of alternative fuels. Natural gas, propane, and biofuels are gaining attention due to their potential to reduce emissions and reliance on traditional fossil fuels. Powertrain systems are being adapted to accommodate these alternative fuel sources.

Energy Recovery Systems

Innovative powertrain systems are incorporating energy recovery systems, such as regenerative braking, to harness and store energy during deceleration and braking. This stored energy can be used to assist the vehicle during acceleration, further improving fuel efficiency.

Customization and Modularization

Manufacturers are offering modular powertrain solutions that allow for customization based on specific commercial applications. This flexibility enables fleet operators to choose powertrains tailored to their needs, whether for long-haul logistics, urban deliveries, or specialized industrial tasks.

Environmental Sustainability

Sustainability is a growing concern in the commercial vehicle sector. Manufacturers are working to minimize the environmental impact of powertrain systems by focusing on recyclable materials, energy efficiency, and reduced emissions throughout the product

lifecycle.

These trends collectively highlight the dynamic nature of the Global Commercial Vehicle Powertrain Systems Market, where technological innovation, environmental responsibility, and operational efficiency are driving forces shaping the industry's future.

Segmental Insights

By Drive Type

Traditional internal combustion engines continue to dominate many segments of the commercial vehicle market. Diesel engines, in particular, are widely used in heavy-duty trucks and buses due to their high torque, long range, and reliability. However, manufacturers are constantly improving ICEs to meet stricter emissions standards and enhance fuel efficiency through technologies like turbocharging and direct injection.

Electric drive systems are gaining substantial traction, particularly in urban environments and for short-distance deliveries. Battery-electric vehicles (BEVs) use electric motors powered by rechargeable batteries, providing zero-emission operation. Hybrid electric vehicles (HEVs) combine internal combustion engines with electric propulsion, offering improved fuel economy and reduced emissions.

Hydrogen fuel cell technology is emerging as a promising alternative for commercial vehicle propulsion, especially for long-haul trucking. Fuel cell vehicles (FCVs) generate electricity by combining hydrogen with oxygen, emitting only water vapor as a byproduct. This drive type offers long ranges and fast refueling, making it suitable for heavy-duty applications.

Natural gas powertrains, including compressed natural gas (CNG) and liquefied natural gas (LNG) systems, are used in certain commercial vehicle segments. They offer lower emissions compared to traditional diesel engines and are favored for their availability and relatively lower operating costs.

Hybrid powertrains combine two or more different drive types to optimize performance and efficiency. Parallel hybrid systems use both an internal combustion engine and an electric motor to drive the vehicle, while series hybrids rely primarily on the electric motor, with the engine acting as a generator. These systems aim to maximize fuel efficiency and reduce emissions.

PHEVs are a subset of hybrid vehicles that can be charged from external power sources, allowing them to operate solely on electricity for a limited range. They offer the flexibility of electric driving while ensuring extended range through the internal combustion engine, making them suitable for various commercial applications.

AWD and 4WD systems are essential for off-road and heavy-duty applications, providing enhanced traction and stability. These drive types are commonly found in commercial vehicles designed for construction, agriculture, and other rugged industries.

Manufacturers are increasingly offering modular powertrain solutions that allow for customization based on specific commercial applications. This trend enables fleet operators to choose the most suitable drive type, whether for long-haul trucking, urban deliveries, or specialized industrial tasks.

The choice of drive type in commercial vehicles is influenced by factors such as application, operational requirements, emissions regulations, and the desire for increased efficiency and sustainability. As the industry continues to evolve, drive type innovation remains pivotal in addressing the diverse needs of the commercial vehicle sector.

By Component Type

The engine is the heart of the powertrain system and plays a central role in converting fuel or electrical energy into mechanical power. Modern commercial vehicle engines are equipped with advanced technologies such as turbocharging, direct injection, and variable valve timing to enhance fuel efficiency and reduce emissions.

Transmission systems are responsible for transmitting power from the engine to the wheels while optimizing speed and torque. In commercial vehicles, transmissions can vary from manual to automatic, automated manual transmissions (AMTs), and continuously variable transmissions (CVTs). These components are vital in determining the vehicle's drivability and fuel efficiency.

Driveline components, including driveshafts and axles, are responsible for transmitting power from the transmission to the wheels. They play a critical role in distributing power evenly among multiple axles, ensuring traction and stability, particularly in heavy-duty and off-road applications.

Clutches are essential components in manual and automated manual transmissions,

engaging and disengaging the transmission from the engine. Torque converters, on the other hand, are key in automatic transmissions, providing smooth and continuous power transfer.

Differentials enable the wheels on the same axle to rotate at different speeds, allowing for smooth cornering and preventing wheel slippage. Advanced differential technologies, such as limited-slip and electronic differential locks, enhance traction and stability in challenging conditions.

In vehicles equipped with four-wheel drive or all-wheel drive, the transfer case splits power between the front and rear axles, enabling off-road capability and improved traction.

For hybrid and electric commercial vehicles, unique components such as electric motors, inverters, and battery management systems are crucial for generating, storing, and managing electrical energy. These components contribute to reduced emissions and enhanced efficiency.

Meeting stringent emissions regulations requires the integration of exhaust and emission control components like catalytic converters, diesel particulate filters (DPFs), and selective catalytic reduction (SCR) systems. These components help minimize harmful emissions and ensure compliance with environmental standards.

Cooling systems are vital for maintaining the optimal operating temperature of engines and electric powertrains. Radiators, fans, and coolant circulation components are essential to prevent overheating and maintain efficiency.

Modern powertrain systems rely on advanced control units and sensors to optimize performance, monitor emissions, and ensure safety. These components gather data and adjust various parameters to achieve the desired balance between power, efficiency, and environmental impact.

The Component Type segment is integral to the development of advanced powertrain systems that address the evolving needs of the commercial vehicle industry, including emissions reduction, fuel efficiency, and enhanced drivability. Manufacturers continually innovate in this segment to deliver more efficient and sustainable powertrains for a wide range of commercial applications.

By Vehicle Type

The Vehicle Type segment within the Global Commercial Vehicle Powertrain Systems Market is a critical factor that influences the design and configuration of powertrain systems to meet the diverse needs of various commercial applications. This segment encompasses a range of vehicle types, each with its specific demands and requirements for powertrain performance and efficiency.

Heavy-duty trucks form a substantial portion of the commercial vehicle market, primarily used for long-haul transport, construction, and heavy-duty applications. Powertrain systems for these vehicles are designed to provide high torque and durability, making diesel engines a common choice, although electric and hydrogen fuel cell options are gaining traction.

Medium-duty trucks are versatile vehicles used in a wide range of applications, including urban deliveries, refrigerated transport, and vocational services. Powertrains for medium-duty trucks strike a balance between performance and fuel efficiency, often featuring diesel, natural gas, or electric options.

Light-duty trucks are essential for last-mile deliveries, utility services, and urban transportation. Powertrain systems for these vehicles are increasingly electrified, with battery-electric and plug-in hybrid options being favored for their emission-free operation and lower operating costs. Buses serve various purposes, including public transportation, school buses, and intercity travel. Powertrain systems for buses prioritize passenger comfort, low emissions, and fuel efficiency. Hybrid and electric buses are becoming prevalent in urban transit applications.

Regional Insights

North America, particularly the United States and Canada, has a substantial market for heavy-duty trucks and is witnessing a growing interest in electrification, especially for urban delivery fleets. Stringent emissions regulations have prompted manufacturers to invest in cleaner powertrain technologies, such as natural gas and electric options. The region also sees innovation in hydrogen fuel cell technology for long-haul trucking.

Europe is at the forefront of emissions reduction efforts, with stringent Euro VI standards and city-specific regulations that encourage low-emission zones. As a result, Europe is a hotspot for electric commercial vehicles and hybrid powertrains, particularly in urban areas. Manufacturers are focusing on integrating advanced powertrain components to meet environmental goals.

The Asia-Pacific region, led by China, is experiencing rapid urbanization and a surge in e-commerce, driving demand for light-duty and electric delivery vans. China, in particular, is a major player in the electric commercial vehicle market, with robust investments in battery technology and charging infrastructure. Hydrogen fuel cell development is also gaining momentum in the region.

Latin America's commercial vehicle market, including heavy-duty trucks and buses, is heavily influenced by economic factors and infrastructure development. Natural gas powertrains are commonly used in some countries due to the availability of resources, while electric vehicles are gradually gaining ground for urban transit and last-mile deliveries.

The Middle East and Africa region is witnessing growth in the construction and mining sectors, driving demand for heavy-duty trucks and specialty vehicles. Diesel powertrains continue to dominate this market, but there is increasing interest in alternative fuels like natural gas and emerging technologies like hydrogen fuel cells.

Emerging markets in Southeast Asia, India, and South America are experiencing a shift toward cleaner powertrains as environmental concerns grow. These regions are exploring electric, hybrid, and natural gas options, driven by urbanization, infrastructure development, and the need for sustainable transportation.

Overall, regional insights highlight the diverse nature of the commercial vehicle powertrain market, with each region addressing unique challenges and opportunities. The adoption of advanced powertrain systems, including electric and hydrogen fuel cell technologies, is increasingly influenced by local regulations, infrastructure development, and the pursuit of more sustainable transportation solutions.

Key Market Players

Toyota Motor Corporation

Hyundai Motor Company

JTEKT Corporation

ZF Friedrichshafen AG

Volkswagen AG

Ford Motor Company

General Motors Company

GKN plc

Borgwarner Inc.

Aisin Seiki Co. Ltd

Report Scope:

In this report, the Global Commercial Vehicle Powertrain Systems Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Commercial Vehicle Powertrain Systems Market, By Drive Type:

Front-Wheel Drive

Rear-Wheel Drive

All-Wheel Drive

Commercial Vehicle Powertrain Systems Market, By Component Type:

Engine

Transmission

Differentials

Driveshaft

Commercial Vehicle Powertrain Systems Market, By Vehicle Type:

LCV

M&HCV

Commercial Vehicle Powertrain Systems 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

Thailand

Australia

South Korea

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 Commercial Vehicle Powertrain Systems Market.

Available Customizations:

Global Commercial Vehicle Powertrain Systems 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).

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. IMPACT OF COVID-19 ON GLOBAL COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET

5. GLOBAL COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Volume & Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Drive Type Market Share Analysis (Front-Wheel Drive, Rear-Wheel Drive, and All-Wheel Drive)

- 5.2.2. By Component Type Market Share Analysis (Engine, Transmission, Differentials, and Driveshaft)
- 5.2.3. By Vehicle Type Market Share Analysis (LCV, M&HCV)
- 5.2.4. By Regional Market Share Analysis
 - 5.2.4.1. Asia-Pacific Market Share Analysis
 - 5.2.4.2. Europe & CIS Market Share Analysis
 - 5.2.4.3. North America Market Share Analysis
 - 5.2.4.4. South America Market Share Analysis
 - 5.2.4.5. Middle East & Africa Market Share Analysis
- 5.2.5. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2022)
- 5.3. Global Commercial Vehicle Powertrain Systems Market Mapping & Opportunity Assessment
 - 5.3.1. By Drive Type Market Mapping & Opportunity Assessment
 - 5.3.2. By Component Type Market Mapping & Opportunity Assessment
 - 5.3.3. By Vehicle Type Market Mapping & Opportunity Assessment
 - 5.3.4. By Regional Market Mapping & Opportunity Assessment

6. ASIA-PACIFIC COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Volume & Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Drive Type Market Share Analysis
 - 6.2.2. By Component Type Market Share Analysis
 - 6.2.3. By Vehicle Type Market Share Analysis
 - 6.2.4. By Country Market Share Analysis
 - 6.2.4.1. China Market Share Analysis
 - 6.2.4.2. India Market Share Analysis
 - 6.2.4.3. Japan Market Share Analysis
 - 6.2.4.4. Indonesia Market Share Analysis
 - 6.2.4.5. Thailand Market Share Analysis
 - 6.2.4.6. South Korea Market Share Analysis
 - 6.2.4.7. Australia Market Share Analysis
 - 6.2.4.8. Rest of Asia-Pacific Market Share Analysis
- 6.3. Asia-Pacific: Country Analysis
 - 6.3.1. China Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.1.1. Market Size & Forecast

- 6.3.1.1.1. By Volume & Value
- 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Drive Type Market Share Analysis
 - 6.3.1.2.2. By Component Type Market Share Analysis
 - 6.3.1.2.3. By Vehicle Type Market Share Analysis
- 6.3.2. India Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Volume & Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Drive Type Market Share Analysis
 - 6.3.2.2.2. By Component Type Market Share Analysis
 - 6.3.2.2.3. By Vehicle Type Market Share Analysis
- 6.3.3. Japan Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Volume & Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Drive Type Market Share Analysis
 - 6.3.3.2.2. By Component Type Market Share Analysis
 - 6.3.3.2.3. By Vehicle Type Market Share Analysis
- 6.3.4. Indonesia Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.4.1. Market Size & Forecast
 - 6.3.4.1.1. By Volume & Value
 - 6.3.4.2. Market Share & Forecast
 - 6.3.4.2.1. By Drive Type Market Share Analysis
 - 6.3.4.2.2. By Component Type Market Share Analysis
 - 6.3.4.2.3. By Vehicle Type Market Share Analysis
- 6.3.5. Thailand Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.5.1. Market Size & Forecast
 - 6.3.5.1.1. By Volume & Value
 - 6.3.5.2. Market Share & Forecast
 - 6.3.5.2.1. By Drive Type Market Share Analysis
 - 6.3.5.2.2. By Component Type Market Share Analysis
 - 6.3.5.2.3. By Vehicle Type Market Share Analysis
- 6.3.6. South Korea Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.6.1. Market Size & Forecast
 - 6.3.6.1.1. By Volume & Value
 - 6.3.6.2. Market Share & Forecast
 - 6.3.6.2.1. By Drive Type Market Share Analysis
 - 6.3.6.2.2. By Component Type Market Share Analysis

- 6.3.6.2.3. By Vehicle Type Market Share Analysis
- 6.3.7. Australia Commercial Vehicle Powertrain Systems Market Outlook
 - 6.3.7.1. Market Size & Forecast
 - 6.3.7.1.1. By Volume & Value
 - 6.3.7.2. Market Share & Forecast
 - 6.3.7.2.1. By Drive Type Market Share Analysis
 - 6.3.7.2.2. By Component Type Market Share Analysis
 - 6.3.7.2.3. By Vehicle Type Market Share Analysis

7. EUROPE & CIS COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Volume & Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Drive Type Market Share Analysis
 - 7.2.2. By Component Type Market Share Analysis
 - 7.2.3. By Vehicle Type Market Share Analysis
 - 7.2.4. By Country Market Share Analysis
 - 7.2.4.1. Germany Market Share Analysis
 - 7.2.4.2. Spain Market Share Analysis
 - 7.2.4.3. France Market Share Analysis
 - 7.2.4.4. Russia Market Share Analysis
 - 7.2.4.5. Italy Market Share Analysis
 - 7.2.4.6. United Kingdom Market Share Analysis
 - 7.2.4.7. Belgium Market Share Analysis
 - 7.2.4.8. Rest of Europe & CIS Market Share Analysis
- 7.3. Europe & CIS: Country Analysis
 - 7.3.1. Germany Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Volume & Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Drive Type Market Share Analysis
 - 7.3.1.2.2. By Component Type Market Share Analysis
 - 7.3.1.2.3. By Vehicle Type Market Share Analysis
 - 7.3.2. Spain Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Volume & Value
 - 7.3.2.2. Market Share & Forecast

- 7.3.2.2.1. By Drive Type Market Share Analysis
- 7.3.2.2.2. By Component Type Market Share Analysis
- 7.3.2.2.3. By Vehicle Type Market Share Analysis
- 7.3.3. France Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Volume & Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Drive Type Market Share Analysis
 - 7.3.3.2.2. By Component Type Market Share Analysis
 - 7.3.3.2.3. By Vehicle Type Market Share Analysis
- 7.3.4. Russia Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Volume & Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Drive Type Market Share Analysis
 - 7.3.4.2.2. By Component Type Market Share Analysis
 - 7.3.4.2.3. By Vehicle Type Market Share Analysis
- 7.3.5. Italy Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Volume & Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Drive Type Market Share Analysis
 - 7.3.5.2.2. By Component Type Market Share Analysis
 - 7.3.5.2.3. By Vehicle Type Market Share Analysis
- 7.3.6. United Kingdom Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.6.1. Market Size & Forecast
 - 7.3.6.1.1. By Volume & Value
 - 7.3.6.2. Market Share & Forecast
 - 7.3.6.2.1. By Drive Type Market Share Analysis
 - 7.3.6.2.2. By Component Type Market Share Analysis
 - 7.3.6.2.3. By Vehicle Type Market Share Analysis
- 7.3.7. Belgium Commercial Vehicle Powertrain Systems Market Outlook
 - 7.3.7.1. Market Size & Forecast
 - 7.3.7.1.1. By Volume & Value
 - 7.3.7.2. Market Share & Forecast
 - 7.3.7.2.1. By Drive Type Market Share Analysis
 - 7.3.7.2.2. By Component Type Market Share Analysis
 - 7.3.7.2.3. By Vehicle Type Market Share Analysis

8. NORTH AMERICA COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Volume & Value

8.2. Market Share & Forecast

8.2.1. By Drive Type Market Share Analysis

8.2.2. By Component Type Market Share Analysis

8.2.3. By Vehicle Type Market Share Analysis

8.2.4. By Country Market Share Analysis

8.2.4.1. United States Market Share Analysis

8.2.4.2. Mexico Market Share Analysis

8.2.4.3. Canada Market Share Analysis

8.3. North America: Country Analysis

8.3.1. United States Commercial Vehicle Powertrain Systems Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Volume & Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Drive Type Market Share Analysis

8.3.1.2.2. By Component Type Market Share Analysis

8.3.1.2.3. By Vehicle Type Market Share Analysis

8.3.2. Mexico Commercial Vehicle Powertrain Systems Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Volume & Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Drive Type Market Share Analysis

8.3.2.2.2. By Component Type Market Share Analysis

8.3.2.2.3. By Vehicle Type Market Share Analysis

8.3.3. Canada Commercial Vehicle Powertrain Systems Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Volume & Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Drive Type Market Share Analysis

8.3.3.2.2. By Component Type Market Share Analysis

8.3.3.2.3. By Vehicle Type Market Share Analysis

9. SOUTH AMERICA COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Volume & Value

9.2. Market Share & Forecast

9.2.1. By Drive Type Market Share Analysis

9.2.2. By Component Type Market Share Analysis

9.2.3. By Vehicle Type Market Share Analysis

9.2.4. By Country Market Share Analysis

9.2.4.1. Brazil Market Share Analysis

9.2.4.2. Argentina Market Share Analysis

9.2.4.3. Colombia Market Share Analysis

9.2.4.4. Rest of South America Market Share Analysis

9.3. South America: Country Analysis

9.3.1. Brazil Commercial Vehicle Powertrain Systems Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Volume & Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Drive Type Market Share Analysis

9.3.1.2.2. By Component Type Market Share Analysis

9.3.1.2.3. By Vehicle Type Market Share Analysis

9.3.2. Colombia Commercial Vehicle Powertrain Systems Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Volume & Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Drive Type Market Share Analysis

9.3.2.2.2. By Component Type Market Share Analysis

9.3.2.2.3. By Vehicle Type Market Share Analysis

9.3.3. Argentina Commercial Vehicle Powertrain Systems Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Volume & Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Drive Type Market Share Analysis

9.3.3.2.2. By Component Type Market Share Analysis

9.3.3.2.3. By Vehicle Type Market Share Analysis

10. MIDDLE EAST & AFRICA COMMERCIAL VEHICLE POWERTRAIN SYSTEMS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Volume & Value

- 10.2. Market Share & Forecast
 - 10.2.1. By Drive Type Market Share Analysis
 - 10.2.2. By Component Type Market Share Analysis
 - 10.2.3. By Vehicle Type Market Share Analysis
 - 10.2.4. By Country Market Share Analysis
 - 10.2.4.1. Turkey Market Share Analysis
 - 10.2.4.2. Iran Market Share Analysis
 - 10.2.4.3. Saudi Arabia Market Share Analysis
 - 10.2.4.4. UAE Market Share Analysis
 - 10.2.4.5. Rest of Middle East & Africa Market Share Africa
- 10.3. Middle East & Africa: Country Analysis
 - 10.3.1. Turkey Commercial Vehicle Powertrain Systems Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Volume & Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Drive Type Market Share Analysis
 - 10.3.1.2.2. By Component Type Market Share Analysis
 - 10.3.1.2.3. By Vehicle Type Market Share Analysis
 - 10.3.2. Iran Commercial Vehicle Powertrain Systems Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Volume & Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Drive Type Market Share Analysis
 - 10.3.2.2.2. By Component Type Market Share Analysis
 - 10.3.2.2.3. By Vehicle Type Market Share Analysis
 - 10.3.3. Saudi Arabia Commercial Vehicle Powertrain Systems Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Volume & Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Drive Type Market Share Analysis
 - 10.3.3.2.2. By Component Type Market Share Analysis
 - 10.3.3.2.3. By Vehicle Type Market Share Analysis
 - 10.3.4. UAE Commercial Vehicle Powertrain Systems Market Outlook
 - 10.3.4.1. Market Size & Forecast
 - 10.3.4.1.1. By Volume & Value
 - 10.3.4.2. Market Share & Forecast
 - 10.3.4.2.1. By Drive Type Market Share Analysis
 - 10.3.4.2.2. By Component Type Market Share Analysis
 - 10.3.4.2.3. By Vehicle Type Market Share Analysis

11. SWOT ANALYSIS

- 11.1. Strength
- 11.2. Weakness
- 11.3. Opportunities
- 11.4. Threats

12. MARKET DYNAMICS

- 12.1. Market Drivers
- 12.2. Market Challenges

13. MARKET TRENDS AND DEVELOPMENTS

14. COMPETITIVE LANDSCAPE

- 14.1. Company Profiles (Up to 10 Major Companies)
 - 14.1.1. Toyota Motor Corporation
 - 14.1.1.1. Company Details
 - 14.1.1.2. Key Product Offered
 - 14.1.1.3. Financials (As Per Availability)
 - 14.1.1.4. Recent Developments
 - 14.1.1.5. Key Management Personnel
 - 14.1.2. Hyundai Motor Company
 - 14.1.2.1. Company Details
 - 14.1.2.2. Key Product Offered
 - 14.1.2.3. Financials (As Per Availability)
 - 14.1.2.4. Recent Developments
 - 14.1.2.5. Key Management Personnel
 - 14.1.3. JTEKT Corporation
 - 14.1.3.1. Company Details
 - 14.1.3.2. Key Product Offered
 - 14.1.3.3. Financials (As Per Availability)
 - 14.1.3.4. Recent Developments
 - 14.1.3.5. Key Management Personnel
 - 14.1.4. ZF Friedrichshafen AG
 - 14.1.4.1. Company Details

- 14.1.4.2. Key Product Offered
- 14.1.4.3. Financials (As Per Availability)
- 14.1.4.4. Recent Developments
- 14.1.4.5. Key Management Personnel
- 14.1.5. Volkswagen AG
 - 14.1.5.1. Company Details
 - 14.1.5.2. Key Product Offered
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Recent Developments
 - 14.1.5.5. Key Management Personnel
- 14.1.6. Ford Motor Company
 - 14.1.6.1. Company Details
 - 14.1.6.2. Key Product Offered
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Recent Developments
 - 14.1.6.5. Key Management Personnel
- 14.1.7. General Motors Company
 - 14.1.7.1. Company Details
 - 14.1.7.2. Key Product Offered
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Recent Developments
 - 14.1.7.5. Key Management Personnel
- 14.1.8. GKN plc
 - 14.1.8.1. Company Details
 - 14.1.8.2. Key Product Offered
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Recent Developments
 - 14.1.8.5. Key Management Personnel
- 14.1.9. Borgwarner Inc.
 - 14.1.9.1. Company Details
 - 14.1.9.2. Key Product Offered
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Recent Developments
 - 14.1.9.5. Key Management Personnel
- 14.1.10. Aisin Seiki Co. Ltd.
 - 14.1.10.1. Company Details
 - 14.1.10.2. Key Product Offered
 - 14.1.10.3. Financials (As Per Availability)
 - 14.1.10.4. Recent Developments

14.1.10.5. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas

15.1.1. Target Regions

15.1.2. Target Component Type

15.1.3. Target Vehicle Type

16. ABOUT US & DISCLAIMER

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