

Light Commercial Vehicles Axle & Propeller Shaft Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Axle Type (Live, Dead, Tandem), By Propeller Shaft Type (Single Piece, Multi Piece), By Demand Category (OEM, Aftermarket) By Region, Competition, 2018-2028

<https://marketpublishers.com/r/LA44F5961677EN.html>

Date: October 2023

Pages: 185

Price: US\$ 4,900.00 (Single User License)

ID: LA44F5961677EN

Abstracts

Global Light Commercial Vehicles Axle & Propeller Shaft Market has valued at USD 6 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.69% through 2028. The operation of a vehicle is significantly influenced by the axles and propeller shafts of the vehicle. Live axles also execute the extra responsibility of supplying the torque to the wheels in addition to bearing the entire weight of the vehicle, cargo, and passengers on the axles. Along with the other elements of the drive train, a propeller shaft's job is to deliver torque and rotation. The growing worldwide vehicle production as well as engineering advancements that are geared toward sustainability and fuel efficiency are major market drivers for axles and propeller shafts. The booming aftermarket demand for automobile axles and propellers in developing nations is a key driver of this market's expansion. Some of the factors driving the growth of the axle & propeller shaft market include an increase in vehicle production and sales across the globe, a rise in the adoption of electric vehicles, higher aftermarket demand for axle & propeller shaft from emerging economies, and a surge in demand for comfortable & fuel-efficient vehicles. However, the market's expansion is anticipated to be hampered by fluctuating raw material prices, vehicle recalls, and regulatory issues. During the projection period, it is also anticipated that the rising demand for all-wheel drive cars and the increased usage of lightweight materials in the production of axle and propeller shafts would create growth possibilities.

Key Market Drivers

Global Expansion of E-Commerce and Last-Mile Delivery

The exponential growth of e-commerce and the increased demand for last-mile delivery services are driving the Global Automotive Light Commercial Vehicle Axle & Propeller Market. The surge in online shopping, accelerated by the COVID-19 pandemic, has created a need for more efficient and versatile delivery vehicles. The growth of e-commerce platforms has resulted in higher package delivery volumes. To meet customer expectations for quick and reliable delivery, logistics companies are expanding their light commercial vehicle fleets. Light commercial vehicles are crucial for last-mile delivery, which involves transporting goods from distribution centers to customers' doorsteps. These vehicles require robust axle and propeller systems that can withstand frequent starts, stops, and maneuvering. Manufacturers are increasingly offering customized axle and propeller solutions tailored to the specific needs of delivery vehicles. This customization includes optimizing load-bearing capacities, improving fuel efficiency, and enhancing durability for high-mileage operations.

Emission Regulations and Environmental Concerns

Stringent emissions regulations and environmental concerns are compelling the automotive industry to adopt cleaner and more fuel-efficient technologies. Light commercial vehicles are no exception, and this drive toward sustainability is influencing axle and propeller system development. Governments worldwide are imposing strict emissions standards to combat climate change and reduce air pollution. Light commercial vehicles are being targeted to lower their carbon footprint, driving the adoption of cleaner technologies. The shift toward hybrid and electric light commercial vehicles is growing. Axle and propeller systems in these vehicles play a vital role in optimizing power distribution and energy management, contributing to reduced emissions. Lightweight materials in axle and propeller systems help reduce the overall weight of vehicles, enhancing fuel efficiency and decreasing emissions. Composite materials, advanced alloys, and efficient design are key drivers in this regard.

Urbanization and Congestion Challenges

The global trend toward urbanization is leading to increased traffic congestion in cities. Light commercial vehicles, often used for urban deliveries, require agile and efficient axle and propeller systems to navigate congested roads. Rapid urbanization is accompanied by a growing demand for goods and services in cities. Light commercial

vehicles are essential for fulfilling this demand, emphasizing the need for reliable drivetrain components. Light commercial vehicles need to maneuver through tight spaces, congested streets, and urban environments. Their axle and propeller systems must provide precise control and responsiveness to ensure safe and efficient operation. To address urban congestion and emissions concerns, some light commercial vehicles are adopting alternative drivetrain technologies such as electric powertrains and hydrogen fuel cells. Axle and propeller systems must adapt to the unique requirements of these technologies.

Safety and Driver Assistance Systems

Safety remains a paramount concern in the automotive industry. Light commercial vehicles often operate in challenging conditions, and the integration of advanced safety and driver assistance systems is a significant driver for axle and propeller system development. Axle and propeller systems contribute to the effectiveness of ESC systems, which help maintain vehicle stability and prevent rollovers. The market is seeing increased demand for ESC-compatible components. ABS relies on precise control of wheel speed, a function that is closely tied to axle and propeller systems. Manufacturers are continuously enhancing the compatibility of these systems with ABS to improve vehicle safety. Light commercial vehicles are increasingly equipped with ADAS features like adaptive cruise control, lane-keeping assist, and collision avoidance systems. Axle and propeller systems play a crucial role in supporting these systems by providing data on vehicle dynamics and wheel speed.

Increased Payload Capacities

The demand for increased payload capacities in light commercial vehicles is another significant driver of axle and propeller system development. Industries such as construction, logistics, and agriculture rely on these vehicles to transport heavy loads efficiently. Axle and propeller systems must be engineered to handle higher payload capacities while maintaining efficiency. Enhanced load-bearing capabilities are crucial for the successful operation of these vehicles. Light commercial vehicles with higher payload capacities can transport more goods in a single trip, improving commercial efficiency and reducing transportation costs. This efficiency is a key factor driving market demand. The integration of axle and propeller systems with advanced suspension systems is essential for ensuring optimal weight distribution, ride comfort, and handling when carrying heavy loads.

Key Market Challenges

Regulatory Compliance and Emissions Standards

One of the most prominent challenges facing the Global Automotive Light Commercial Vehicle Axle & Propeller Market is the ever-increasing stringency of emissions regulations worldwide. Governments are imposing strict limits on vehicle emissions to combat air pollution and climate change. Light commercial vehicles are no exception, and they must adhere to these regulations to operate legally. Meeting these stringent emissions standards necessitates the incorporation of emission reduction technologies into the vehicle's powertrain, including the axle and propeller system. These technologies can add complexity and cost to the manufacturing process. As the market explores alternative fuels such as compressed natural gas (CNG) and hydrogen, axle and propeller systems must be adaptable to these technologies, posing additional challenges in terms of design and integration.

Integration of Advanced Technologies

The integration of advanced technologies, such as electronic stability control (ESC), anti-lock braking systems (ABS), and advanced driver assistance systems (ADAS), poses a significant challenge. These systems rely heavily on data from the axle and propeller systems, requiring precise coordination and compatibility. To support safety and performance-enhancing technologies, axle and propeller systems need to incorporate various sensors. These sensors can add complexity to the design, making it challenging to maintain reliability and durability. The growing adoption of electric and hybrid light commercial vehicles introduces the need for axle and propeller systems that can efficiently transmit power from electric motors. These systems must be designed to accommodate the unique characteristics of electric propulsion.

Durability and Reliability

Light commercial vehicles often operate in demanding conditions, such as frequent starts and stops, off-road terrain, and heavy payloads. Axle and propeller systems must withstand these conditions while maintaining reliability. High maintenance costs can be a deterrent for fleet operators. The challenge lies in designing axle and propeller systems that require minimal maintenance while still meeting durability expectations. Maintaining consistent quality across manufacturing batches is essential. Even minor variations in component quality can lead to reliability issues, which can be costly to address through recalls or repairs.

Weight and Fuel Efficiency

Balancing Weight and Strength: Achieving the ideal balance between weight reduction and structural strength is a significant challenge. While lightweight materials can improve fuel efficiency, they must not compromise the durability and load-bearing capacity of axle and propeller components. Light commercial vehicles are expected to deliver fuel economy without sacrificing performance or payload capacity. This challenge drives manufacturers to develop axle and propeller systems that minimize energy losses during power transmission. As electric and hybrid vehicles gain popularity in this segment, optimizing the efficiency of axle and propeller systems for these drivetrains becomes crucial. These systems must efficiently transmit power from electric motors while minimizing energy losses.

Customization and Adaptation

The light commercial vehicle segment comprises a wide range of vehicle types, from vans and pickups to delivery trucks and minibuses. Each vehicle type has unique requirements for axle and propeller systems, demanding customization and adaptation. Light commercial vehicles are used for a wide variety of purposes, each with its own payload requirements. Designing systems that accommodate these varying capacities while maintaining efficiency and safety is a complex challenge. The global nature of the market means that vehicles must perform in diverse environments and climates. Axle and propeller systems must be adaptable to these conditions, including extreme temperatures, rugged terrains, and varying road conditions.

Key Market Trends

Electrification and Hybridization of Light Commercial Vehicles

The trend toward electrification and hybridization of light commercial vehicles (LCVs) is one of the most transformative forces in the automotive industry, significantly impacting the design, development, and adoption of axle and propeller systems. The adoption of electric powertrains in LCVs has accelerated, driven by environmental concerns and the need for urban-friendly vehicles. Axle and propeller systems in electric LCVs are designed to efficiently transmit power from electric motors to the wheels, emphasizing lightweight and high-efficiency designs. Hybrid LCVs, which combine internal combustion engines with electric propulsion, are becoming more prevalent. Axle and propeller systems in hybrid vehicles play a critical role in power distribution between the engine and electric motor, optimizing fuel efficiency and enhancing overall performance.

As the electric LCV market grows, the availability and accessibility of charging infrastructure become essential. Axle and propeller systems must support the varying energy demands and regenerative braking characteristics of electric drivetrains.

Urbanization and Last-Mile Delivery Demand

The rapid pace of urbanization and the surge in e-commerce have led to an increased demand for LCVs for last-mile delivery. This trend is influencing the design and capabilities of axle and propeller systems. As cities become more crowded, LCVs must navigate through congested streets and make frequent stops. Axle and propeller systems need to provide precise control, agility, and durability to meet the demands of urban delivery operations. The rise of e-commerce, further accelerated by the COVID-19 pandemic, has increased the volume of deliveries, requiring efficient LCVs. Axle and propeller systems are crucial in ensuring the reliability and performance of delivery vehicles. Customization for Delivery: Manufacturers are developing axle and propeller solutions customized for delivery vehicles, with a focus on optimizing load-bearing capacities, reducing wear and tear, and improving fuel efficiency for high-mileage urban operations.

Lightweight Materials and Fuel Efficiency

The push for fuel efficiency and reduced emissions is driving the adoption of lightweight materials and innovative design approaches in axle and propeller systems for LCVs. Lightweight materials such as high-strength steel alloys, aluminum, and composite materials are being increasingly used in the construction of axle and propeller components. These materials offer the strength and durability required while reducing weight, contributing to improved fuel efficiency. Lightweight design principles are crucial for improving the overall efficiency of LCVs. Reduced weight means less energy is required to propel the vehicle, resulting in improved fuel economy. Advanced materials and efficient design also reduce rolling resistance and energy losses in the drivetrain. Achieving lightweight construction while maintaining load-bearing capacities is a challenge. Axle and propeller systems must be engineered to balance weight reduction with the ability to handle the demands of varying payloads.

Integration of Advanced Electronics and Safety Features

The integration of advanced electronics and safety features in LCVs is transforming axle and propeller systems into intelligent components that enhance vehicle performance, safety, and efficiency. Axle and propeller systems increasingly incorporate electronic

sensors that monitor parameters such as wheel speed, torque distribution, and wheel slip. This data is essential for optimizing vehicle stability, traction control, and performance. Axle and propeller systems play a vital role in vehicle stability and safety. They are involved in functions such as stability control, anti-lock braking, and traction control. The integration of electronic sensors and advanced control algorithms enhances the safety features of these systems. LCVs are now equipped with ADAS features like adaptive cruise control, lane-keeping assist, and collision avoidance systems. Axle and propeller systems provide critical data for these systems, improving vehicle safety and driver assistance capabilities.

Customization for Diverse Applications

The diverse range of applications for LCVs, from cargo vans to passenger shuttles, requires customization and adaptability in axle and propeller system design. LCVs used for cargo transport require axle and propeller systems optimized for load-bearing capacity, durability, and fuel efficiency. Customization for different cargo types and sizes is essential. LCVs used for passenger transport, such as minibuses and shuttle services, require comfortable and stable axle and propeller systems that prioritize passenger safety and comfort. Some LCVs are designed for off-road or specialty applications, such as construction or utility vehicles. These vehicles demand robust axle and propeller systems capable of handling rough terrain and heavy loads.

Segmental Insights

Axle Type Analysis

When compared to tandem and dead axles, the live axle category is expected to have the largest market. The live axle market would grow as vehicle performance was improved and more torque was delivered. The market would be driven by increasing vehicle production as well as engineering developments to meet the shifting consumer needs. The efficient arrangement of bearings and novel designs for axle components that make optimal use of gear locations are expected to help reduce axle weight and increase vehicle efficiency. Consequently, it is anticipated that the live axle industry will expand during the upcoming years.

Propeller Shaft Type Analysis

During the projection period, the single piece market is anticipated to be the largest for propeller shafts. Due to advantages like reduced mechanical and frictional losses and

shorter distances between the engine and the rear axle, the single-piece propeller shaft is typically favored in light-duty vehicles. Additionally, compared to multi-piece shafts, these single-piece shafts deliver effective performance at a faster speed. The single-piece propeller shaft holds the biggest share during the predicted period as a result of these considerations. This kind of propeller shaft is made from traditional materials such as steel SM45C, stainless steel, and composite materials like HS carbon epoxy, e-glass polyester, and Kevlar epoxy.

Regional Insights

Due to rising light Vehicle production and steady demand for aftermarket parts, Asia Pacific is anticipated to experience the greatest growth rate over the projected period. Drive shafts and other axle-related components of the powertrain are becoming more and more necessary because of the region's thriving automobile industry. China is expected to produce tremendous demand for axle and propeller shafts as one of the market's top consumers. A few of the elements predicted to have a positive influence on the growth of the car market and the promotion of its production include rising infrastructure development spending in India and other emerging nations, as well as changing regulations for vehicle emissions. This is expected to enhance local demand for vehicle components like drive shafts.

The second largest and most established market for automobile axles and propeller shafts is thought to be Europe, and it is expected to continue to grow steadily over the coming years. Strict fuel-economy regulations are predicted to be the main development driver, motivating businesses to engage in R&D to create lightweight vehicle solutions. The need for axle and propeller shafts is thought to be driven by the strong demand for vehicles in Germany, the UK, and France in comparison to other nations, as well as the increase in premium vehicle sales. A greater quality of axles and propellers would be in more demand as end consumers' preferences for comfort in cars grow.

Key Market Players

Dana Corporation

IFA Rotorion

Meritor Inc.

Korea Flange Co. Ltd. (KOFKO)

ZF Friedrichshafen AG

Showa Corporation

JTEKT Corporation

GKN-Walterscheid GmbH

American Axle & Manufacturing, Inc.

Gelenkwellen-Service GmbH

Report Scope:

In this report, the Global Light Commercial Vehicles Axle & Propeller Shaft Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Light Commercial Vehicles Axle & Propeller Shaft Market, By Axle Type:

Live

Dead

Tandem

Light Commercial Vehicles Axle & Propeller Shaft Market, By Propeller Shaft:

Single Piece

Multi Piece

Light Commercial Vehicles Axle & Propeller Shaft Market, By Demand Category:

OEM

Aftermarket

Light Commercial Vehicles Axle & Propeller Shaft Market, By Region:

Asia-Pacific

China

India

Japan

Indonesia

Thailand

South Korea

Australia

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

North America

United States

Canada

Mexico

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Turkey

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Light Commercial Vehicles Axle & Propeller Shaft Market.

Available Customizations:

Global Light Commercial Vehicles Axle & Propeller Shaft 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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