

Medium & Heavy 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

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Abstracts

Global Medium & Heavy Commercial Vehicles Axle & Propeller Shaft Market has valued at USD 10 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.57% 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

Regulatory Compliance and Emissions Standards

The Global Automotive Medium & Heavy Commercial Vehicle Axle & Propeller Market is strongly driven by the regulatory landscape and emissions standards imposed by governments worldwide. Commercial vehicles play a significant role in global transportation, but they are also major contributors to air pollution and greenhouse gas emissions. As a result, governments have implemented stringent emissions regulations to mitigate environmental impact. Governments are increasingly focused on reducing air pollution and mitigating climate change. Stringent emissions standards and mandates for commercial vehicles are being enforced globally. These regulations drive manufacturers to develop cleaner and more fuel-efficient vehicles, including the optimization of axle and propeller systems to reduce energy losses and improve efficiency. Manufacturers are investing in emission control technologies such as selective catalytic reduction (SCR), exhaust gas recirculation (EGR), and diesel particulate filters (DPF). Axle and propeller systems contribute to the overall efficiency of these technologies by minimizing power losses and optimizing drivetrain performance. To meet emissions standards, many commercial vehicle manufacturers are exploring alternative fuels and powertrains. This includes the adoption of electric, hybrid, and hydrogen fuel cell technologies, which require innovative axle and propeller system designs to accommodate these new propulsion systems.

Electrification and Hybridization of Commercial Vehicles

The shift toward electrification and hybridization of medium and heavy commercial vehicles is a prominent driver in the axle and propeller system market. This trend is driven by environmental concerns, the desire for operational cost savings, and advancements in battery and electric motor technology. Electric commercial vehicles, often referred to as e-trucks, are gaining traction. They rely on electric motors for propulsion, and this shift necessitates specialized axle and propeller system designs to efficiently transmit power from the motors to the wheels. Hybrid commercial vehicles combine internal combustion engines with electric propulsion systems. Axle and propeller systems in these vehicles must facilitate the seamless transition between power sources, optimizing fuel efficiency and performance. As the electric commercial vehicle 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.

Safety and Advanced Driver Assistance Systems (ADAS)

Safety is a paramount concern in the commercial vehicle industry, and advanced safety features and driver assistance systems are driving developments in axle and propeller systems. Axle and propeller systems contribute to the effectiveness of ESC systems, which help maintain vehicle stability and prevent rollovers. Manufacturers are continuously enhancing the compatibility of these systems with axle and propeller components to improve vehicle safety. ABS relies on precise control of wheel speed, a function that is closely tied to axle and propeller systems. Manufacturers are continually improving the compatibility of these systems with ABS to enhance vehicle safety. Advanced Driver Assistance Systems (ADAS), including adaptive cruise control, lane-keeping assist, and collision avoidance systems, are becoming increasingly common in commercial vehicles. Axle and propeller systems provide critical data on vehicle dynamics and wheel speed, enhancing the performance of these systems.

Payload Efficiency and Transportation Demands

Commercial vehicles are essential for transporting goods and materials efficiently. This driver is related to the need to optimize payload capacities and operational efficiency. 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. Commercial vehicles are critical for industries such as logistics, construction, and agriculture. Higher payload capacities allow these vehicles to transport more goods in a single trip, improving commercial efficiency and reducing transportation costs. 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.

Urbanization and Last-Mile Delivery

Rapid urbanization and the growing demand for last-mile delivery services are significantly impacting the commercial vehicle market, including the design of axle and propeller systems. Urbanization is accompanied by a growing demand for goods and services in cities. Medium and heavy commercial vehicles are essential for fulfilling this demand, emphasizing the need for reliable drivetrain components. Commercial vehicles operating in urban environments need to maneuver through tight spaces, congested streets, and challenging traffic conditions. Axle and propeller systems must provide precise control and responsiveness to ensure safe and efficient operation. To address

urban congestion and emissions concerns, some 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.

Key Market Challenges

Regulatory Compliance and Emissions Standards

The stringent regulatory environment is one of the primary challenges facing the Global Automotive Medium & Heavy Commercial Vehicle Axle & Propeller Market. Governments worldwide are imposing increasingly strict emissions standards to address environmental concerns and reduce the carbon footprint of commercial vehicles. The commercial vehicle industry operates in multiple countries, each with its own set of emissions regulations and compliance requirements. This diversity creates a significant challenge for manufacturers, as they must design axle and propeller systems that meet various standards simultaneously. Emissions standards are continually evolving, becoming more stringent over time. Manufacturers must invest heavily in research and development to keep pace with these changes and ensure that their axle and propeller systems contribute to emissions reduction. Meeting emissions standards often requires the implementation of emission control technologies, which can add complexity and weight to vehicles. Axle and propeller systems must be designed to minimize the impact on fuel efficiency while accommodating these technologies.

Electrification and Alternative Propulsion Systems

The transition to electrification and alternative propulsion systems poses significant challenges to the development and integration of axle and propeller systems for medium and heavy commercial vehicles. The adoption of electric drivetrains in commercial vehicles, including trucks and buses, introduces new design considerations for axle and propeller systems. These systems must efficiently transmit power from electric motors while accommodating high torque and regenerative braking characteristics. Hydrogen fuel cell commercial vehicles are emerging as an alternative to battery-electric vehicles. Axle and propeller systems must be designed to handle the unique power distribution requirements of fuel cells, including the supply of electricity to electric motors. For electric commercial vehicles, the availability and accessibility of charging infrastructure are critical. Axle and propeller systems must support various charging methods and voltages while ensuring durability and reliability.

Safety and Advanced Driver Assistance Systems (ADAS)

Safety is paramount in the commercial vehicle sector, and the integration of advanced safety features and driver assistance systems presents challenges for axle and propeller system manufacturers. Axle and propeller systems need to be compatible with a wide range of safety systems, including electronic stability control (ESC), anti-lock braking systems (ABS), and advanced driver assistance systems (ADAS). These systems rely on data from the axle and propeller systems to enhance vehicle safety. The integration of sensors for ADAS and autonomous driving presents challenges in terms of space and compatibility. Axle and propeller systems must accommodate sensors while maintaining their structural integrity and performance. Safety-critical functions require redundancy in sensor data and system reliability. Axle and propeller systems must be engineered to ensure that any potential failure does not compromise vehicle safety.

Payload Efficiency and Transportation Demands

Commercial vehicles are designed to transport goods and materials efficiently, and challenges related to payload efficiency and transportation demands have a significant impact on axle and propeller system design. 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 heavy-duty commercial vehicles. 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. This integration requires precise engineering and testing. Commercial vehicle operators are under pressure to improve fuel efficiency and reduce operational costs. Axle and propeller systems play a crucial role in optimizing fuel consumption by minimizing energy losses during power transmission.

Urbanization and Last-Mile Delivery

Rapid urbanization and the increased demand for last-mile delivery services are posing challenges for commercial vehicles, including the design of axle and propeller systems. Medium and heavy commercial vehicles operating in urban environments face unique challenges, including navigating through tight spaces, dealing with congestion, and making frequent stops. Axle and propeller systems must provide precise control and responsiveness to ensure safe and efficient operation. Many cities are implementing stricter emissions regulations within urban areas, further complicating the design of commercial vehicles. Axle and propeller systems must be part of the solution for

reducing emissions while maintaining performance. Some commercial vehicles operating in urban environments are transitioning to alternative drivetrain technologies, such as electric powertrains or hydrogen fuel cells. Axle and propeller systems must adapt to the specific requirements of these technologies.

Key Market Trends

Electrification and Alternative Propulsion Systems

One of the most transformative trends in the Global Automotive Medium & Heavy Commercial Vehicle Axle & Propeller Market is the rapid adoption of electrification and alternative propulsion systems. Commercial vehicles are increasingly transitioning away from traditional internal combustion engines, and this shift is redefining the design and functionality of axle and propeller systems. The market is witnessing a surge in electric commercial vehicles (e-trucks). These vehicles rely on electric motors, often mounted within or near the axle, for propulsion. Axle and propeller systems for e-trucks require unique designs to accommodate electric drivetrains, optimize weight distribution, and maximize energy efficiency. Hydrogen fuel cell commercial vehicles are also emerging. These vehicles use fuel cells to generate electricity on board, which powers electric motors. Axle and propeller systems in hydrogen fuel cell vehicles must facilitate the efficient distribution of power from the fuel cell to the wheels. Some commercial vehicles are adopting dual-mode or hybrid propulsion systems, which combine internal combustion engines with electric or hydrogen-based technologies. Axle and propeller systems in these vehicles need to seamlessly switch between different power sources, optimizing fuel efficiency and performance.

Sustainability and Emissions Reduction

The growing emphasis on sustainability and emissions reduction is a driving force in the market. Governments, businesses, and consumers are increasingly concerned about the environmental impact of commercial vehicles, leading to several key trends. Stringent emissions regulations are pushing manufacturers to develop cleaner and more efficient vehicles. Axle and propeller systems play a critical role in achieving emissions targets by improving drivetrain efficiency and reducing energy losses. The market is witnessing a shift toward lightweight materials in axle and propeller system design. High-strength steel alloys, aluminum, and composite materials are being used to reduce component weight, enhancing fuel efficiency and reducing emissions. Energy recovery systems, such as regenerative braking, are becoming more common in commercial vehicles. Axle and propeller systems are integral to the implementation of

these systems, which capture and store energy during braking and reuse it to improve fuel efficiency.

Autonomous and Connected Commercial Vehicles

Autonomous and connected commercial vehicles are revolutionizing the transportation industry. These advanced technologies are driving changes in axle and propeller systems to support the unique requirements of self-driving and interconnected fleets. Autonomous and connected vehicles rely on a variety of sensors, including cameras, LiDAR, and radar, to perceive their surroundings. Axle and propeller systems must be designed to accommodate the installation and integration of these sensors without compromising performance. Connected commercial vehicles constantly exchange data with other vehicles, infrastructure, and control centers. Axle and propeller systems play a role in transmitting data related to vehicle dynamics, which is crucial for safe and efficient autonomous operation. Many commercial vehicles are equipped with ADAS features, such as adaptive cruise control and lane-keeping assist. Axle and propeller systems contribute to the effectiveness of these systems by providing data on vehicle dynamics and wheel speed.

Digital Twin and Predictive Maintenance

The adoption of digital twin technology and predictive maintenance solutions is growing in the commercial vehicle sector. These trends are reshaping the way axle and propeller systems are monitored, maintained, and optimized. Digital twins are virtual replicas of physical commercial vehicles and their components, including axle and propeller systems. These digital twins enable real-time monitoring, performance analysis, and predictive maintenance, ensuring optimal system health and longevity. Predictive maintenance solutions leverage data from sensors and digital twins to anticipate component failures and schedule maintenance proactively. This approach minimizes downtime, reduces repair costs, and extends the lifespan of axle and propeller systems. Remote diagnostics technologies are becoming more prevalent, allowing fleet managers and service providers to monitor the condition of axle and propeller systems remotely. This real-time monitoring enables timely intervention and ensures safe and efficient operation.

Telematics and Fleet Management

Telematics and fleet management solutions are playing an increasingly significant role in the commercial vehicle industry. These technologies are enhancing operational

efficiency, safety, and compliance, and they have implications for axle and propeller systems. Telematics systems provide real-time vehicle tracking, allowing fleet managers to monitor the location and status of commercial vehicles. This data helps optimize routes and ensures that axle and propeller systems are not subjected to unnecessary wear and tear. Telematics solutions enable remote maintenance scheduling based on usage data and predictive analytics. Fleet operators can plan axle and propeller system maintenance more effectively, reducing downtime and improving efficiency. Telematics systems assist in regulatory compliance by tracking vehicle data and generating reports. This ensures that commercial vehicles, including their axle and propeller systems, adhere to safety and environmental regulations.

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 Medium & Heavy 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:

Medium & Heavy Commercial Vehicles Axle & Propeller Shaft Market, By Axle Type:

Live

Dead

Tandem

Medium & Heavy Commercial Vehicles Axle & Propeller Shaft Market, By Propeller Shaft:

Single Piece

Multi Piece

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

OEM

Aftermarket

Medium & Heavy 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 Medium & Heavy Commercial Vehicles Axle & Propeller Shaft Market.

Available Customizations:

Global Medium & Heavy 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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