



China Automotive Transmission Industry Report, 2010-2011

July 2011

This report

- ◆ **Analyzes China automotive transmission market**
- ◆ **Focuses on China passenger car and commercial vehicle transmission market**
- ◆ **Highlights the operation of key transmission manufacturers.**

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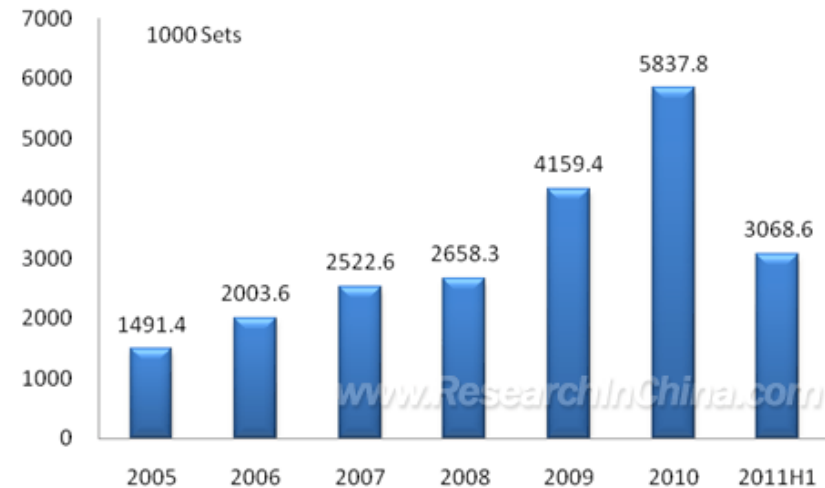
Abstract

In 2010, the booming auto industry in China brought about the rapid expansion of automotive transmission market, where the demand increased by 32.5% to over 18 million units.

Transmissions can be divided into automatic and manual types, wherein, the former one has developed at a quicker pace. In 2005, the automatic transmission in China achieved a market size of 1.4914 million units and climbed to 5.8378 million units in 2010, with an average growth rate of 31.4% over the 5 years, and 40.35% in 2010 especially.

The fast-growing automatic transmission market has attracted multinational automatic transmission manufacturers to invest in China. Most of these manufacturers entered China through joint ventures, and have a relatively fixed supply relationship with clients.

Market Size of Automatic Transmission in China, 2005-2011



Source: ResearchInChina

For example, Tianjin AW Automatic Transmission Co., Ltd. jointly established by Aisin and China FAW Group Corporation in 2004 has achieved the automatic transmission output of 130,000 units annually, which are mainly supplied to such luxury cars as Crown and Reiz of Tianjin FAW TOYOTA Motor and Red Flag of Changchun FAW; in the same year, ZF Friedrichshafen AG joined hands with SAIC Motor to establish ZF Transmissions Shanghai Co., Ltd. mainly for the supply to Passat B5 of Shanghai Volkswagen.

In Nov.2008, BorgWarner cooperated with China Zhongfalian Investment Co., Ltd. consisting of 12 auto manufacturers to establish BorgWarner DualTronic Transmission Systems Co., Ltd. for the production of core components of DCT dual-clutch automatic transmission, with the 12 auto manufacturers as major clients. The company was put into production in May 2011, with an annual capacity of 150,000-200,000 units.

Besides analyzing and researching the overall automotive transmission market in China, this report emphasizes the research on the automatic transmission market, probing into the supply relationship between automatic transmission manufacturers and automobile manufacturers as well as their present and planning capacities. On this basis, the report also gives a prediction for the development trend of the automatic transmission in China.

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