China Automotive Transmission Industry Report, 2012-2015

Dec. 2012

ResearchInChina
www.researchinchina.com

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include China Association of Automobile Manufacturers, and National Bureau of Statistics of China etc.

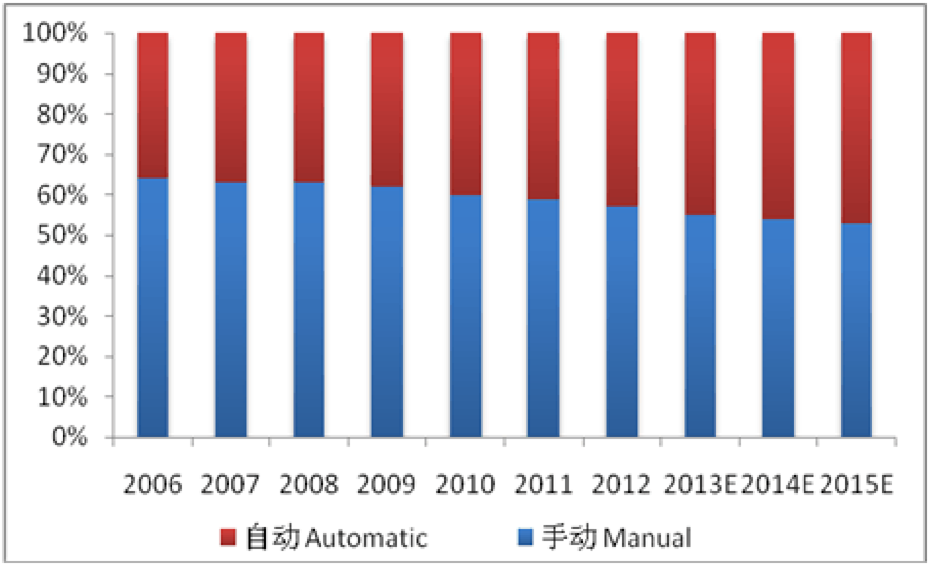
Abstract

Following the slight increase in vehicle production, China's demand for automotive transmission will also rise in 2012, with a growth rate of 6% or so. To be specific, the manual transmission demand will see a year-on-year increase of about 2.62%, and automatic transmission over 10% with further improvement in matching ratio.

In China, automatic transmission still mainly finds application in the passenger car market, with relevant matching rate rising from 41% in 2011 to 43% in 2012, and expected to hit 47% in 2015. As far as the type is concerned, AT is now regarded as the mainstream among passenger car automatic transmissions, and nearly all major self-owned brand senior and intermediate passenger cars listed for sales in 2012 adopt AT transmission provided by foreign suppliers. Meanwhile, driven by the Industry Alliance formed by BorgWarner, Inc., etc., there is a growing number of enterprises that put into DCT production and it is anticipated to be the mainstream in the future.

At present, there are more than 20 enterprises engaged in the production of automatic transmission. According to the data on

China Passenger Car Automatic / Manual Transmission Market Share, 2006-2015



Source: ResearchInChina *China Automotive Transmission Industry Report, 2012-2015*

capacity built or under construction of these enterprises, China's production capacity of automatic transmissions will reach 7.75 million units in 2015, covering AT (2.63 million units, 33.9%), DCT (43.9%), CVT (17.0%) and AMT (5.2%).

In the AT field, Shanghai GM-Dongyue Motors Co., Ltd., Zhejiang Geely Holding Group Co., Ltd and AW Tianjin Automobile Parts Co., Ltd. are equipped with large capacity, of which, Shanghai GM-Dongyue Motors, with a production capacity of 600,000 units, mainly supports GM vehicle models; Geely has established automatic transmission production bases in Xiangtan (Hunan Province) and Jining (Shandong Province) successively since 2009, coupled with the acquisition on the Australian DSI Automatic Transmission Company, thus producing AT capacity of 410,000 units.

In the DCT field, Volkswagen Automatic Transmission boasts the largest capacity, roughly 700,000 units in 2012. In H2 2012, Volkswagen built two automatic transmission production bases in Tianjin and Dalian for the DCT production, which plan to be commissioned in 2014, by then, Volkswagen's DCT transmission capacity in China will soar to 1.45 million units, towering over its counterparts.

China Automotive Transmission Industry Report, 2012-2015 of ResearchInChina mainly covers the followings:

- Overall market size, imports & exports of transmission and prediction of market size during 2012-2015;
- Development and prospect of automatic transmission, involving key companies, R&D, and progress in R&D of four major types of automatic transmissions, etc.;
- Market size & forecast, major automatic transmission manufacturers, capacity, supporting relations, etc. of passenger car transmission;
- Market size & forecast, capacity, market structure, etc. of commercial vehicle transmission;
- Development of Chinese-owned companies and joint ventures, mainly covering product type, product sales, capacity, etc..

Table of contents

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Selected Charts

- Manual Transmission Gears
- Advantages and Disadvantages of Manual Transmission and Automatic Transmission
- Technology Comparison among Main Manufacturers of Four Types of Automatic Transmission
- Key Policies on China Automotive Transmission Industry
- China Automotive Transmission Market Size, 2006-2015
- Supporting Modes of China Automotive Transmission Industry
- China Manual Transmission Market Size, 2006-2015
- Production and Sales Volume of Major Chinese Manual Transmission Enterprises, 2010
- Import/Export Value of China Automotive Transmission and Parts, 2007-2012
- Import/Export Value of China Transmission and Parts for 30-seat and above Motor Bus, 2007-2012
- Top 10 Import Origins of China Transmission and Parts for 30-seat and above Motor Bus, 2012
- Import/Export Value of China Truck Transmission and Parts, 2007-2012
- Import/Export Value of China Sedan Automatic Transmission, 2007-2012
- Top 10 Import Origins of China Sedan Automatic Transmission, 2012
- Import Matching Rate of China Sedan Automatic Transmission, 2007-2015
- China Automatic Transmission Market Size, 2006-2015
- Automatic Transmission Equipping of Major Auto Brands Worldwide
- Automatic Transmission Equipping of Major Intermediate and Senior Passenger Cars in China
- List of Volkswagen DSG Models
- Business Name and Type of Various Car Brand DCT
- Formal Classification of PEV Arrangement
- Configuration and Parameters of Chevrolet Volt vs BYD e6
- Difference in Technological Requirements for Automatic Transmission from Internal Combustion Engine and Electromotor
- Automatic Transmission Equipping of Major Own-brand Intermediate and Senior Passenger Cars
- R&D Type Statistics of Automatic Transmission by Mainland Chinese Manufacturers, 2012
- Independent R&D Type Distribution of Automatic Transmission in China, 2012

Selected Charts

- Independent R&D Prospect for Automatic Transmission
- Domestic Pathways of All Types of Automatic Transmission
- Gearing, Shift Modes and Features of All Types of Automatic Transmission
- Comparison of Characteristics among Main Automatic Transmission Parts
- Performance Comparison among All Types of Automatic Transmission
- Development Direction of All Types of Automatic Transmission
- Torque Converter Supporting Manufacturers of Shaanxi Aerospace Power Hi-tech Co., Ltd.
- Planetary Gear Train Assembly Diagram
- China's Single-car Demand for Half Axle, Planetary and Combined Gears, 2010-2015E
- China Passenger Car Transmission Market Size, 2006-2015
- China Passenger Car Automatic/Manual Transmission Market Share, 2006-2015
- China Passenger Car Manual Transmission Market Size, 2006-2015
- China Passenger Car Automatic Transmission Market Size, 2006-2015
- Capacity Structure of China Passenger Car Automatic Transmission by Type, 2015
- Capacity Built and under Construction of All Kinds of Passenger Car Automatic Transmission in China, 2012
- Main Supporting Enterprises and Models of Foreign Automatic Transmission Companies in China
- Matching Ratios of Domestic and Foreign Passenger Car Automatic Transmission
- China Commercial Vehicle Transmission Market Size, 2006-2015
- Key Commercial Vehicle Transmission Manufacturers in China
- Key Commercial Vehicle Transmission Supporting Enterprises
- Major Capacity under Construction of Commercial Vehicle Automatic Transmission in China, 2012
- China Heavy-duty Truck Transmission Market Size, 2006-2015
- Internal Transmission Supply of Key Heavy Duty Truck Enterprises in China
- China Medium Duty Truck Transmission Market Size, 2006-2015
- Transmission Sources of Key Medium Duty Truck Enterprises in China
- China Light Duty Truck Transmission Market Size, 2006-2015

Selected Charts

- China Bus Transmission Market Size, 2006-2015
- Market Share of Medium- and Large-size Bus Transmission Enterprises in China, 2011
- Bus Automatic Transmission Assembly Rate in Major Countries Worldwide
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Chongqing Tsingshan Industrial, 2006-2010
- Sales of Shaanxi Fast Auto Drive Group, 2008-2012
- Export Revenue of Shaanxi Fast Auto Drive Group, 2009-2012
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Shaanxi Fast Auto Drive Group, 2006-2012
- Revenue and Gross Margin of Zhejiang Wanliyang Transmission, 2007-2012
- Revenue and Gross Margin of Main Products of Zhejiang Wanliyang Transmission, 2011-2012
- Revenue and Net Income of Major Transmission Subsidiaries of Zhejiang Wanliyang Transmission, 2011
- Revenue of Shandong Linyi Lingong Automobile Axle and Gearbox, 2008-2012
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Shandong Linyi Lingong Automobile Axle and Gearbox, 2006-2019
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Anhui Xingrui Gear Transmission, 2006-2010
- Turnover and Gross Margin of Geely Holding Group, 2008-2012
- Turnover of Transmission Business of Geely Holding Group, 2009-2012
- Transmission Subsidiaries of Geely Holding Group
- CVT Models for Geely Automobile
- Manual Transmission Assembly Production and Sales Volume of Datong Gear, 2006-2010
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Qijiang Gear Transmission, 2006-2011
- Assets, Liabilities and Revenue of Volkswagen Transmission (Shanghai), 2008-2012
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Volkswagen Transmission (Shanghai), 2006-2010
- Transmission Sales Volume of Tangshan Aisin Gear, 2006-2010
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of GETRAG (Jiangxi) Transmission, 2007-2010
- Business Indicators of GETRAG Nanchang Plant, 2008-2009
- Business Indicators of GETRAG Ganzhou Plant, 2008

Selected Charts

- Business Indicators of GETRAG Yudu Plant, 2008
- Major Clients of Hangzhou HAVECO Automotive Transmission
- Main Transmission Products of Hangzhou HAVECO Automotive Transmission
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Dongan Mitsubishi, 2006-2009
- Major Products and Theoretical Capacity of Dongan Mitsubishi
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Shanghai Automobile Gear Works, 2008-2010
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Shenyang SAIC-Jinbei Transmission, 2008-2010
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Shandong SAIC Automotive Transmission, 2009-2010
- Production, Sales Volume and Supporting Models of Manual Transmission Assembly of Liuzhou SAIC Automotive Transmission, 2010
- Business Indicators of ZF Transmissions Shanghai, 2009-2010
- Business Indicators of ZF Drivetech (Hangzhou), 2008-2009
- Business Indicators of ZF Drivetech (Suzhou), 2008-2009
- Key Clients of ZF Drivetech (Suzhou)

How to Buy

You can place your order in the following alternative ways:

1.Order online at www.researchinchina.com

2.Fax order sheet to us at fax number:+86 10 82601570

3. Email your order to: report@researchinchina.com

4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng,Landianchang,Haidian District,Beijing Bank Account No #: 110060668012015061217 Routing No # : 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license) …………..2,000 USD

Hard copy ………………….……. 2,100 USD

PDF (Enterprisewide license)…....... 3,100 USD

※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via PayPal.

ResearchInChina
www.researchinchina.com