



# **China Gear Industry Report, 2012-2013**

**Jan. 2013**

## 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 Company Reports, and National Bureau of Statistics of China etc.

## Abstract

China's gear output reached 1.90 million tons in 2012, rising 36.6% from a year earlier. Although the overall scale and growth indicates China's strong gear demand, there is still a large gap between China and foreign countries in basic research and development, product performance and so forth, and high-end products still need to be imported.

Gear as an important part of the equipment industry finds exceedingly wide applications, with the automotive industry as the main application field. Gear manufacturers have their specific focus products, with high concentration in various market segments. For example, in the heavy-duty truck transmission market, Fast occupies a market share of 75%; in the medium-duty, light-duty and mini-truck transmission market, Wanliyang is expected to raise its market share to 34% after acquiring Shandong Lingong; in the bus transmission market, Qijiang Gear Transmission has maintained a market share of 70% or so.

**Shaanxi Fast:** It has an annual capacity of 1 million automotive transmissions, 50 million gears and 100,000 tons of automotive forgings. In July 2012, the first CX series heavy-duty hydraulic automatic transmission of Xi'an FC Intelligence Transmission Co., Ltd. (newly established) rolled off the production line.

**Zhejiang Wanliyang Transmission:** It boasts six wholly-owned or

controlled transmission subsidiaries, with an annual capacity of 1.2 million transmissions of more than 1,000 varieties, mainly supporting commercial vehicle manufacturers including Beiqi Foton, Dongfeng Motor, Sinotruk Chengdu Wangpar Commercial Vehicles, Ziyang Nanjun, etc.

### Business Focuses and Main Products of Major Gear Companies

Company	Main Products
Shaanxi Fast	Heavy-duty automotive transmission, automotive gear
Nanjing High Accurate Drive Equipment Manufacturing Group (NGC)	Wind power, building material and metallurgical machinery gears
Jiangsu Pacific Precision Forging	Automotive gear
Qijiang Gear Transmission	Bus transmission
CNGPOWER Gearbox	Wind power, building material, and high-power marine gearbox
Dalian Huarui Heavy Industry Group	Wind power gearbox
Zhejiang Wanliyang Transmission	Light-duty and medium-duty automotive transmission
Chongqing Qingshan Industrial	Automotive Transmission
Hangzhou Advance Gearbox Group	Marine gearbox and engineering mechanical gearbox

Source: ResearchInChina *China Gear Industry Report, 2012-2013*

Jiangsu Pacific Precision Forging: In the first three quarters of 2012, it achieved revenue of RMB318 million, a year-on-year growth of 17.56%; the net income attributable to parent company was RMB 849 million, a year-on-year growth of 35.67%. Major customers include FAW-Volkswagen, Shanghai Volkswagen, Shanghai GM and Changan Ford, GM North America, Volkswagen Germany and John Deere, BYD, Great Wall, Changan, Wuling. GM and Volkswagen have become the company's most important customers.

**The report resolves around the followings:**

- Definition, classification and policies of gear industry;
- Output of China gear industry;
- Development features of China gear industry;
- Downstream applications and development trends of China gear industry;
- Development trends of China gear industry;
- Profile, financial data, main projects, capacity and future strategies of 11 major gear companies.

### 1. Definition, Classification and Policies of Gear Industry

### 2. Market Scale of Gear Industry (2011-2016)

### 3. Development Features of Gear Industry

#### 3.1 Industry Concentration

#### 3.2 Products

#### 3.3 Regional Distribution

#### ----Output of Top 10 Provinces (2009-2012)

#### 3.4 Downstream Distribution

#### ----China's Automotive Gear Demand in 2015

#### ----China's Wind Power Gear Demand in 2015

#### ----China's Nuclear Power Gear Demand in 2015

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#### 4.2 Technology Development Trends of Gear Industry

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##### 5.1.2 Capacity

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##### 5.1.5 Latest Project

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