



Global and China Automotive Transmission Industry Report, 2014-2018

June 2015

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

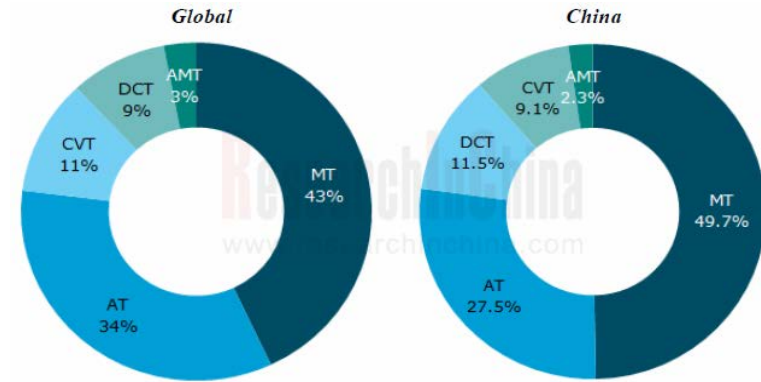
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Global automotive transmission market approximated 90 million units in 2014, up 2.8% from a year earlier, and is expected to maintain a low growth rate of around 3% over the next couple years. As a large auto maker and market in the world, China's demand for automotive transmission approached 24 million units in 2014, accounting for 26% of the global total, and is expected to keep a 6.7% growth rate over the next few years, with the country's share of the global total rising to 32% in 2018.

No matter around the world or in China, manual transmission is still a major market force, and is expected to still hold dominant position in 2018. In automatic transmission field, AT makes up the largest chunk, and has presented two trends in recent years: evolution to continuously variable transmission (CVT) and dual-clutch transmission (DCT), gradual increase in the number of gears. In Europe, seven-gear AT is evolving to eight/nine-gear AT; in the United States, AT is evolving to CVT that is mainly installed in small cars; in Japan where CVT prevails, mini passenger vehicles, small passenger vehicles, and a variety of ordinary FF models all take advantage of overhaul of auto models or engine change as an opportunity to adopt CVT. In China, the way AT is heading is multiple gears, as the AT deployed in passenger vehicle moves toward six gears or even more.

Global and Chinese Automotive Transmission Market Structure, 2018E



Source: ResearchInChina

Aisin, the world's largest transmission producer, provides four categories of products- MT, AT, AMT, and CVT, and occupied a market share of over 10% in 2014. More than 60% of transmissions produced by Aisin are supplied to Toyota. The company has twelve production bases around the world, four of which are located in China, separately in Tianjin (two), Suzhou (one), and Tangshan (1), with total capacity of 1.37 million units, including 770,000 units automatic transmissions, with products mostly supplied to FAW Toyota and FAW Car.

JATCO is the world's largest supplier of CVT, and at the same time produces both AT and hybrid transmission. The company produces 5.3 million units of automatic transmissions annually, making up 10% of automatic transmission market. The products are mostly supplied to several shareholders including Nissan, Mitsubishi and Suzuki, as well as global companies like Renault and GM. JATCO's production base in China is located in Guangzhou city, with annual capacity of 1 million units, serving primarily Dongfeng Nissan.

Global and China Automotive Transmission Industry Report, 2014-2018 by ResearchInChina highlights the followings:

- Size, structure, development features of four market segments (AT, DCT, CVT, AMT), major manufacturers, supporting relationship of global automotive transmission market;
- Size, structure, development features, production capacity, four market segments (AT/DCT/CVT/AMT) of the Chinese automotive transmission market;
- Development of global and Chinese transmission manufacturers, and Chinese autonomous and joint-venture transmission companies, including type and sales volume of product, capacity, etc.

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