

# Global Automotive Electrified Transmission Systems Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Automotive Electrified Transmission Systems market size is expected to reach \$ 33371 million by 2032, rising at a market growth of 8.3% CAGR during the forecast period (2026-2032).

Automotive Electrified Transmission Systems refer to transmission assemblies or core transmission modules used in battery electric vehicles, plug in hybrid vehicles, hybrid electric vehicles and electrified commercial vehicles to transfer power, reduce speed, multiply torque, shift gear ratios, split power, couple torque and deliver differential output. Major product forms include single speed EV reduction gearboxes, multi speed EV transmissions, dedicated hybrid transmissions, plug in hybrid transmission systems, electric axle transmission modules, and the gearbox and differential sections of electric drive units, excluding standalone traction motors, inverters, electronic control units and traction batteries.

From an industry perspective, production and application are mainly concentrated in China, Japan, South Korea, Germany and the United States, where electric vehicle and hybrid vehicle supply chains are relatively mature. China is expanding rapidly in EV reduction gearboxes and dedicated hybrid transmissions, while Japan and Europe retain strong capabilities in hybrid transmission technologies, precision gears and high end electrified drivetrain solutions. These systems are mainly used in passenger cars, light commercial vehicles, medium and heavy duty trucks, electric buses, logistics vehicles and high performance EVs, serving as a critical mechanical interface between motors, engines and wheel end output in electrified powertrains.

In 2025, global Automotive Electrified Transmission Systems production reached approximately 26.5 million sets to 29.5 million sets. Single speed reduction gearboxes

for battery electric passenger cars remained the largest product category by shipment volume, with average FOB prices generally ranging from USD 350 to USD 750 per set. Dedicated hybrid transmissions and plug in hybrid transmission systems were typically priced between USD 900 and USD 1,800 per set, reflecting the integration of gear sets, clutches, power split mechanisms and actuation components. Medium and heavy duty commercial vehicle electrified transmission systems and multi speed EV transmissions carried higher unit values, usually ranging from USD 2,500 to USD 8,000 per set. Based on the global vehicle mix and product portfolio, the weighted average FOB price of Automotive Electrified Transmission Systems was approximately USD 650 to USD 760 per set.

The global Automotive Electrified Transmission Systems market is moving from a phase driven mainly by single speed EV reduction gearboxes to a broader upgrade cycle covering battery electric vehicles, plug in hybrids, hybrid vehicles and electrified commercial vehicles. Over the past few years, the rapid adoption of battery electric passenger cars has accelerated the standardization of single speed reduction gearboxes, with competition increasingly focused on lightweight design, high efficiency, low noise, high speed motor compatibility and cost reduction. At the same time, the fast expansion of plug in hybrid and extended range electric vehicles, especially in China, has brought dedicated hybrid transmissions back into the center of market growth. For automakers, the transmission system is no longer only a conventional mechanical component. It has become a core system that affects energy consumption, driving range, acceleration, thermal behavior, noise performance and vehicle platform cost. As 800 V platforms, high speed motors, multi motor all wheel drive systems, commercial vehicle electrification and hybrid powertrain architectures continue to expand, demand for high efficiency gears, low loss bearings, integrated park lock mechanisms, oil cooling designs and compact transmission modules is expected to increase further.

Key market challenges come from pricing pressure, technology route fragmentation and supply chain restructuring. Single speed EV reduction gearboxes for passenger cars have already entered a scale driven competition phase, where margins are increasingly compressed by automaker cost reduction programs. Dedicated hybrid transmissions, multi speed EV transmissions and commercial vehicle electrified transmission systems offer higher value per vehicle, but they also require longer development cycles, more complex calibration, deeper platform integration and stronger engineering validation capability. On the demand side, passenger cars will remain the largest application market, but the growth logic is changing. Entry level and mass market vehicles prioritize cost, reliability and stable supply, while premium vehicles increasingly require high speed operation, low noise and efficiency optimization. Commercial vehicles place more

emphasis on load capacity, gradeability, durability and total cost of ownership. In the coming years, suppliers with precision gear manufacturing capability, vehicle platform co development experience, hybrid system know how and global OEM supply capacity are likely to secure more durable positions in the Automotive Electrified Transmission Systems market.

This report studies the global Automotive Electrified Transmission Systems production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Electrified Transmission Systems and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Electrified Transmission Systems that contribute to its increasing demand across many markets.

#### Highlights and key features of the study

Global Automotive Electrified Transmission Systems total production and demand, 2021-2032, (Set)

Global Automotive Electrified Transmission Systems total production value, 2021-2032, (USD Million)

Global Automotive Electrified Transmission Systems production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Set), (based on production site)

Global Automotive Electrified Transmission Systems consumption by region & country, CAGR, 2021-2032 & (Set)

U.S. VS China: Automotive Electrified Transmission Systems domestic production, consumption, key domestic manufacturers and share

Global Automotive Electrified Transmission Systems production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Set)

Global Automotive Electrified Transmission Systems production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Set)

Global Automotive Electrified Transmission Systems production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Set)

This report profiles key players in the global Automotive Electrified Transmission Systems market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BorgWarner Inc., ZF Friedrichshafen AG, Robert Bosch GmbH, Schaeffler AG, Magna International Inc., Dauch Corporation, Dana Incorporated, Allison Transmission Inc., Eaton Corporation

plc, Cummins Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive Electrified Transmission Systems market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Set) and average price (US\$/Set) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Electrified Transmission Systems Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Electrified Transmission Systems Market, Segmentation by Type:

Single Speed Transmissions

Two Speed Transmissions

Multi Speed Hybrid Transmissions

Global Automotive Electrified Transmission Systems Market, Segmentation by Transmission Architecture:

Parallel Shaft Gearboxes

Planetary Gear Transmissions

Hybrid Power Split Transmissions

Others

Global Automotive Electrified Transmission Systems Market, Segmentation by Vehicle Propulsion Type:

Battery Electric Vehicle Transmissions

Hybrid Electric Vehicle Transmissions

Global Automotive Electrified Transmission Systems Market, Segmentation by Sales Channel:

Original Equipment Manufacturer Supply

Aftermarket Replacement and Service

Global Automotive Electrified Transmission Systems Market, Segmentation by Application:

Passenger Cars

Light Commercial Vehicles

## Medium and Heavy Commercial Vehicles

### Companies Profiled:

BorgWarner Inc.

ZF Friedrichshafen AG

Robert Bosch GmbH

Schaeffler AG

Magna International Inc.

Dauch Corporation

Dana Incorporated

Allison Transmission Inc.

Eaton Corporation plc

Cummins Inc.

AISIN Corporation

JATCO Ltd

Nidec Corporation

Hyundai Transys Inc.

Punch Powertrain

BYD Company Limited

HYCET E-Chuang Technology Co., Ltd.

Jing-Jin Electric Technologies Co., Ltd.

Suzhou Inovance Automotive Co., Ltd.

Landai Technology Group Corp., Ltd.

Zhejiang Wanliyang Co., Ltd.

Chongqing Tsingshan Industrial Co., Ltd.

Shanghai Automobile Gear Works Co., Ltd.

HOTA Industrial Mfg. Co., Ltd.

Sona BLW Precision Forgings Ltd.

#### Key Questions Answered:

1. How big is the global Automotive Electrified Transmission Systems market?
2. What is the demand of the global Automotive Electrified Transmission Systems market?
3. What is the year over year growth of the global Automotive Electrified Transmission Systems market?
4. What is the production and production value of the global Automotive Electrified Transmission Systems market?
5. Who are the key producers in the global Automotive Electrified Transmission Systems market?
6. What are the growth factors driving the market demand?

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Figure 69. World Automotive Electrified Transmission Systems Production Value Market

Share by Application (2021-2032)

Figure 70. World Automotive Electrified Transmission Systems Average Price by Application (2021-2032) & (US\$/Set)

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Figure 74. Automotive Electrified Transmission Systems Sales Channels, Direct Sales, and Distribution

Figure 75. Methodology

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