

Global Automotive Inverted-Tooth Chain Market Growth 2026-2032

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Abstracts

The global Automotive Inverted-Tooth Chain market size is predicted to grow from US\$ 572 million in 2025 to US\$ 725 million in 2032; it is expected to grow at a CAGR of 3.4% from 2026 to 2032.

In 2025, global Automotive Inverted-Tooth Chain sales reached approximately 55,760 K Units with an average global market price of around 10.48 USD per Unit.

Automotive Inverted-Tooth Chain is a precision toothed chain used in vehicle engines, transmissions, transfer cases, and hybrid drivetrain systems. It is also widely referred to as automotive silent chain. The chain is typically composed of multiple inverted-tooth link plates, pins or rocker joints, and guide plates. Its internal tooth profile meshes continuously with dedicated sprockets to achieve speed synchronization, torque transmission, and power-path conversion. Compared with roller chains, inverted-tooth chains generate lower meshing impact, noise, and vibration, making them suitable for high-speed, compact, and low-NVH automotive powertrain environments. Typical applications include engine timing systems, oil pump drives, balance shaft drives, automatic transmission chain drives, four-wheel-drive transfer cases, and P2/P3/P4 hybrid drive mechanisms. Public information from leading suppliers indicates that automotive inverted-tooth chains are evolving toward smaller pitch, lower friction, higher durability, lower noise, and greater system integration, moving from conventional engine components to critical transmission elements in high-efficiency powertrains.

Automotive inverted-tooth chains are typically produced under a model of OEM platform nomination, Tier-1 system validation, and large-scale precision chain manufacturing. The product must be co-developed with engines, transmissions, or hybrid systems and validated through durability, wear, fatigue, NVH, and thermal stability testing before

mass production. A reasonable industry gross margin range is approximately 20%–35%: mature timing chains and mid-range drive chains are usually around 20%–28%; compact low-noise inverted-tooth chains, HY-VO-type high-efficiency drive chains, hybrid or transfer-case chains, and integrated systems supplied with sprockets, guides, and tensioners may reach around 28%–35%. Low-end aftermarket parts or contract-manufacturing products are generally below this range. Upstream inputs include high-grade alloy steel, precision tooling, stamping equipment, heat treatment, coatings, and lubricants. Midstream activities include link-plate stamping, joint processing, heat treatment, assembly, pre-stretching, and system integration. Downstream customers include engine manufacturers, transmission suppliers, automakers, and the automotive aftermarket.

Market Development Opportunities & Main Driving Factors

The growth opportunity for automotive inverted-tooth chains is driven by the combined upgrade of efficient combustion engines, hybrid powertrains, and low-noise mechanical drives. Although electrification is accelerating, the IEA reported that global electric car sales reached about 21 million units in 2025, representing roughly one in four new cars sold; this also means that a large share of new vehicles still relies on engines, hybrid engines, and mechanical transmission systems. China's auto-sector work plan targeted around 32.3 million vehicle sales and 15.5 million NEV sales in 2025, while plug-in hybrids, extended-range vehicles, and fuel-efficient combustion vehicles continue to support demand for timing chains, oil pump chains, balance shaft chains, transfer case chains, and hybrid drive chains. The core value of inverted-tooth chains lies in low NVH, high efficiency, compact packaging, and long service life, helping automakers improve fuel economy, reliability, and perceived cabin quality.

Market Challenges, Risks & Restraints

The main long-term risk is the substitution of traditional engine timing chain demand by battery electric vehicles. As BEV penetration increases, suppliers that depend heavily on combustion-engine timing chains may face shrinking programs and annual price reduction pressure. At the same time, platform-based automotive sourcing strengthens dual-supplier strategies, localization, and cost transparency. Although chain value per vehicle is not high, quality responsibility is substantial: elongation, tooth jumping, abnormal noise, or chain failure can directly affect engine and drivetrain reliability. Entry barriers are concentrated in material consistency, tooth-profile design, heat-treatment stability, fatigue-life databases, full-vehicle NVH validation, and global quality-system certification. New entrants cannot easily enter mainstream OEM platforms through

equipment investment alone.

Downstream Demand Trends

Downstream demand is shifting from traditional timing chains toward multi-application chain-drive systems. Incremental demand from pure combustion vehicles is becoming more stable, but hybrids, extended-range vehicles, four-wheel-drive SUVs, pickups, light trucks, and high-efficiency automatic transmissions still require low-noise, high-torque-density, and durable chain-drive solutions. BorgWarner's public materials show that inverted-tooth silent chains have been used in transmissions, transfer cases, and P2/P3/P4 hybrid architectures, indicating that the application boundary is expanding. Future product trends will focus on smaller pitch, low-friction rocker joints, lightweight link plates, wear-resistant coatings, and integrated systems combining chains, sprockets, tensioners, and guides. Suppliers with early-stage co-development capability, global program experience, and system-level delivery capability will be better positioned to win long-cycle platform orders.

LP Information, Inc. (LPI) ' newest research report, the "Automotive Inverted-Tooth Chain Industry Forecast" looks at past sales and reviews total world Automotive Inverted-Tooth Chain sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive Inverted-Tooth Chain sales for 2026 through 2032. With Automotive Inverted-Tooth Chain sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Automotive Inverted-Tooth Chain industry.

This Insight Report provides a comprehensive analysis of the global Automotive Inverted-Tooth Chain landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive Inverted-Tooth Chain portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive Inverted-Tooth Chain market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive Inverted-Tooth Chain and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced

view of the current state and future trajectory in the global Automotive Inverted-Tooth Chain.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive Inverted-Tooth Chain market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Round-Pin

Rocker-Joint

Rolling-Pin

Others

Segmentation by Pitch:

Small Pitch Class (?8mm)

Medium Pitch Class (8mm)

Large Pitch Class (?8mm)

Segmentation by Sales Channel:

OEM Supply

OES Service Parts

Independent Aftermarket

Others

Segmentation by Application:

Passenger Vehicles

Commercial Vehicles

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Tsubakimoto Chain

BorgWarner

iwis SE & Co

Daido Kogyo

Hangzhou Donghua Chain Group

L.G. Balakrishnan & Bros

Qingdao Choho Industrial

K.M.C Automobile Transmission

Ming Chang Traffic Parts Mfg. Co., Ltd.

Zhejiang Hengjiu Machinery Group Co., Ltd.

Hangzhou SFR Chain Technology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive Inverted-Tooth Chain market?

What factors are driving Automotive Inverted-Tooth Chain market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive Inverted-Tooth Chain market opportunities vary by end market size?

How does Automotive Inverted-Tooth Chain break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Automotive Inverted-Tooth Chain Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Automotive Inverted-Tooth Chain by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Automotive Inverted-Tooth Chain by Country/Region, 2021, 2025 & 2032

2.2 Automotive Inverted-Tooth Chain Segment by Type

- 2.2.1 Round-Pin
 - 2.2.2 Rocker-Joint
 - 2.2.3 Rolling-Pin
 - 2.2.4 Others
 - 2.2.5 Automotive Inverted-Tooth Chain Sales by Type
 - 2.2.5.1 Global Automotive Inverted-Tooth Chain Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Automotive Inverted-Tooth Chain Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Automotive Inverted-Tooth Chain Sale Price by Type (2021-2026)
- #### 2.3 Automotive Inverted-Tooth Chain Segment by Pitch
- 2.3.1 Small Pitch Class (?8mm)
 - 2.3.2 Medium Pitch Class (8mm)
 - 2.3.3 Large Pitch Class (?8mm)
 - 2.3.4 Automotive Inverted-Tooth Chain Sales by Pitch
 - 2.3.4.1 Global Automotive Inverted-Tooth Chain Sales Market Share by Pitch (2021-2026)

2.3.4.2 Global Automotive Inverted-Tooth Chain Revenue and Market Share by Pitch (2021-2026)

2.3.4.3 Global Automotive Inverted-Tooth Chain Sale Price by Pitch (2021-2026)

2.4 Automotive Inverted-Tooth Chain Segment by Sales Channel

2.4.1 OEM Supply

2.4.2 OES Service Parts

2.4.3 Independent Aftermarket

2.4.4 Others

2.4.5 Automotive Inverted-Tooth Chain Sales by Sales Channel

2.4.5.1 Global Automotive Inverted-Tooth Chain Sales Market Share by Sales Channel (2021-2026)

2.4.5.2 Global Automotive Inverted-Tooth Chain Revenue and Market Share by Sales Channel (2021-2026)

2.4.5.3 Global Automotive Inverted-Tooth Chain Sale Price by Sales Channel (2021-2026)

2.5 Automotive Inverted-Tooth Chain Segment by Application

2.5.1 Passenger Vehicles

2.5.2 Commercial Vehicles

2.5.3 Automotive Inverted-Tooth Chain Sales by Application

2.5.3.1 Global Automotive Inverted-Tooth Chain Sale Market Share by Application (2021-2026)

2.5.3.2 Global Automotive Inverted-Tooth Chain Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global Automotive Inverted-Tooth Chain Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automotive Inverted-Tooth Chain Breakdown Data by Company

3.1.1 Global Automotive Inverted-Tooth Chain Annual Sales by Company (2021-2026)

3.1.2 Global Automotive Inverted-Tooth Chain Sales Market Share by Company (2021-2026)

3.2 Global Automotive Inverted-Tooth Chain Annual Revenue by Company (2021-2026)

3.2.1 Global Automotive Inverted-Tooth Chain Revenue by Company (2021-2026)

3.2.2 Global Automotive Inverted-Tooth Chain Revenue Market Share by Company (2021-2026)

3.3 Global Automotive Inverted-Tooth Chain Sale Price by Company

3.4 Key Manufacturers Automotive Inverted-Tooth Chain Producing Area Distribution, Sales Area, Product Type

- 3.4.1 Key Manufacturers Automotive Inverted-Tooth Chain Product Location Distribution
- 3.4.2 Players Automotive Inverted-Tooth Chain Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AUTOMOTIVE INVERTED-TOOTH CHAIN BY GEOGRAPHIC REGION

- 4.1 World Historic Automotive Inverted-Tooth Chain Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Automotive Inverted-Tooth Chain Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Automotive Inverted-Tooth Chain Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Automotive Inverted-Tooth Chain Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Automotive Inverted-Tooth Chain Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Automotive Inverted-Tooth Chain Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Automotive Inverted-Tooth Chain Sales Growth
- 4.4 APAC Automotive Inverted-Tooth Chain Sales Growth
- 4.5 Europe Automotive Inverted-Tooth Chain Sales Growth
- 4.6 Middle East & Africa Automotive Inverted-Tooth Chain Sales Growth

5 AMERICAS

- 5.1 Americas Automotive Inverted-Tooth Chain Sales by Country
 - 5.1.1 Americas Automotive Inverted-Tooth Chain Sales by Country (2021-2026)
 - 5.1.2 Americas Automotive Inverted-Tooth Chain Revenue by Country (2021-2026)
- 5.2 Americas Automotive Inverted-Tooth Chain Sales by Type (2021-2026)
- 5.3 Americas Automotive Inverted-Tooth Chain Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Automotive Inverted-Tooth Chain Sales by Region

6.1.1 APAC Automotive Inverted-Tooth Chain Sales by Region (2021-2026)

6.1.2 APAC Automotive Inverted-Tooth Chain Revenue by Region (2021-2026)

6.2 APAC Automotive Inverted-Tooth Chain Sales by Type (2021-2026)

6.3 APAC Automotive Inverted-Tooth Chain Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Automotive Inverted-Tooth Chain by Country

7.1.1 Europe Automotive Inverted-Tooth Chain Sales by Country (2021-2026)

7.1.2 Europe Automotive Inverted-Tooth Chain Revenue by Country (2021-2026)

7.2 Europe Automotive Inverted-Tooth Chain Sales by Type (2021-2026)

7.3 Europe Automotive Inverted-Tooth Chain Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automotive Inverted-Tooth Chain by Country

8.1.1 Middle East & Africa Automotive Inverted-Tooth Chain Sales by Country (2021-2026)

8.1.2 Middle East & Africa Automotive Inverted-Tooth Chain Revenue by Country (2021-2026)

8.2 Middle East & Africa Automotive Inverted-Tooth Chain Sales by Type (2021-2026)

8.3 Middle East & Africa Automotive Inverted-Tooth Chain Sales by Application

(2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Automotive Inverted-Tooth Chain

10.3 Manufacturing Process Analysis of Automotive Inverted-Tooth Chain

10.4 Industry Chain Structure of Automotive Inverted-Tooth Chain

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Automotive Inverted-Tooth Chain Distributors

11.3 Automotive Inverted-Tooth Chain Customer

12 WORLD FORECAST REVIEW FOR AUTOMOTIVE INVERTED-TOOTH CHAIN BY GEOGRAPHIC REGION

12.1 Global Automotive Inverted-Tooth Chain Market Size Forecast by Region

12.1.1 Global Automotive Inverted-Tooth Chain Forecast by Region (2027-2032)

12.1.2 Global Automotive Inverted-Tooth Chain Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Automotive Inverted-Tooth Chain Forecast by Type (2027-2032)

12.7 Global Automotive Inverted-Tooth Chain Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Tsubakimoto Chain

13.1.1 Tsubakimoto Chain Company Information

13.1.2 Tsubakimoto Chain Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.1.3 Tsubakimoto Chain Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Tsubakimoto Chain Main Business Overview

13.1.5 Tsubakimoto Chain Latest Developments

13.2 BorgWarner

13.2.1 BorgWarner Company Information

13.2.2 BorgWarner Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.2.3 BorgWarner Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 BorgWarner Main Business Overview

13.2.5 BorgWarner Latest Developments

13.3 iwis SE & Co

13.3.1 iwis SE & Co Company Information

13.3.2 iwis SE & Co Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.3.3 iwis SE & Co Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 iwis SE & Co Main Business Overview

13.3.5 iwis SE & Co Latest Developments

13.4 Daido Kogyo

13.4.1 Daido Kogyo Company Information

13.4.2 Daido Kogyo Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.4.3 Daido Kogyo Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Daido Kogyo Main Business Overview

13.4.5 Daido Kogyo Latest Developments

13.5 Hangzhou Donghua Chain Group

13.5.1 Hangzhou Donghua Chain Group Company Information

13.5.2 Hangzhou Donghua Chain Group Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.5.3 Hangzhou Donghua Chain Group Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Hangzhou Donghua Chain Group Main Business Overview

13.5.5 Hangzhou Donghua Chain Group Latest Developments

13.6 L.G. Balakrishnan & Bros

13.6.1 L.G. Balakrishnan & Bros Company Information

13.6.2 L.G. Balakrishnan & Bros Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.6.3 L.G. Balakrishnan & Bros Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 L.G. Balakrishnan & Bros Main Business Overview

13.6.5 L.G. Balakrishnan & Bros Latest Developments

13.7 Qingdao Choho Industrial

13.7.1 Qingdao Choho Industrial Company Information

13.7.2 Qingdao Choho Industrial Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.7.3 Qingdao Choho Industrial Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Qingdao Choho Industrial Main Business Overview

13.7.5 Qingdao Choho Industrial Latest Developments

13.8 K.M.C Automobile Transmission

13.8.1 K.M.C Automobile Transmission Company Information

13.8.2 K.M.C Automobile Transmission Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.8.3 K.M.C Automobile Transmission Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 K.M.C Automobile Transmission Main Business Overview

13.8.5 K.M.C Automobile Transmission Latest Developments

13.9 Ming Chang Traffic Parts Mfg. Co., Ltd.

13.9.1 Ming Chang Traffic Parts Mfg. Co., Ltd. Company Information

13.9.2 Ming Chang Traffic Parts Mfg. Co., Ltd. Automotive Inverted-Tooth Chain Product Portfolios and Specifications

13.9.3 Ming Chang Traffic Parts Mfg. Co., Ltd. Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Ming Chang Traffic Parts Mfg. Co., Ltd. Main Business Overview

13.9.5 Ming Chang Traffic Parts Mfg. Co., Ltd. Latest Developments

13.10 Zhejiang Hengjiu Machinery Group Co., Ltd.

- 13.10.1 Zhejiang Hengjiu Machinery Group Co., Ltd. Company Information
- 13.10.2 Zhejiang Hengjiu Machinery Group Co., Ltd. Automotive Inverted-Tooth Chain Product Portfolios and Specifications
- 13.10.3 Zhejiang Hengjiu Machinery Group Co., Ltd. Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.10.4 Zhejiang Hengjiu Machinery Group Co., Ltd. Main Business Overview
- 13.10.5 Zhejiang Hengjiu Machinery Group Co., Ltd. Latest Developments
- 13.11 Hangzhou SFR Chain Technology Co., Ltd.
- 13.11.1 Hangzhou SFR Chain Technology Co., Ltd. Company Information
- 13.11.2 Hangzhou SFR Chain Technology Co., Ltd. Automotive Inverted-Tooth Chain Product Portfolios and Specifications
- 13.11.3 Hangzhou SFR Chain Technology Co., Ltd. Automotive Inverted-Tooth Chain Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.11.4 Hangzhou SFR Chain Technology Co., Ltd. Main Business Overview
- 13.11.5 Hangzhou SFR Chain Technology Co., Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Automotive Inverted-Tooth Chain Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Automotive Inverted-Tooth Chain Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Round-Pin

Table 4. Major Players of Rocker-Joint

Table 5. Major Players of Rolling-Pin

Table 6. Major Players of Others

Table 7. Global Automotive Inverted-Tooth Chain Sales by Type (2021-2026) & (K Units)

Table 8. Global Automotive Inverted-Tooth Chain Sales Market Share by Type (2021-2026)

Table 9. Global Automotive Inverted-Tooth Chain Revenue by Type (2021-2026) & (\$ million)

Table 10. Global Automotive Inverted-Tooth Chain Revenue Market Share by Type (2021-2026)

Table 11. Global Automotive Inverted-Tooth Chain Sale Price by Type (2021-2026) & (US\$/Unit)

Table 12. Major Players of Small Pitch Class (?8mm)

Table 13. Major Players of Medium Pitch Class (8mm)

Table 14. Major Players of Large Pitch Class (?8mm)

Table 15. Global Automotive Inverted-Tooth Chain Sales by Pitch (2021-2026) & (K Units)

Table 16. Global Automotive Inverted-Tooth Chain Sales Market Share by Pitch (2021-2026)

Table 17. Global Automotive Inverted-Tooth Chain Revenue by Pitch (2021-2026) & (\$ million)

Table 18. Global Automotive Inverted-Tooth Chain Revenue Market Share by Pitch (2021-2026)

Table 19. Global Automotive Inverted-Tooth Chain Sale Price by Pitch (2021-2026) & (US\$/Unit)

Table 20. Major Players of OEM Supply

Table 21. Major Players of OES Service Parts

Table 22. Major Players of Independent Aftermarket

Table 23. Major Players of Others

Table 24. Global Automotive Inverted-Tooth Chain Sales by Sales Channel (2021-2026) & (K Units)

Table 25. Global Automotive Inverted-Tooth Chain Sales Market Share by Sales Channel (2021-2026)

Table 26. Global Automotive Inverted-Tooth Chain Revenue by Sales Channel (2021-2026) & (\$ million)

Table 27. Global Automotive Inverted-Tooth Chain Revenue Market Share by Sales Channel (2021-2026)

Table 28. Global Automotive Inverted-Tooth Chain Sale Price by Sales Channel (2021-2026) & (US\$/Unit)

Table 29. Global Automotive Inverted-Tooth Chain Sale by Application (2021-2026) & (K Units)

Table 30. Global Automotive Inverted-Tooth Chain Sale Market Share by Application (2021-2026)

Table 31. Global Automotive Inverted-Tooth Chain Revenue by Application (2021-2026) & (\$ million)

Table 32. Global Automotive Inverted-Tooth Chain Revenue Market Share by Application (2021-2026)

Table 33. Global Automotive Inverted-Tooth Chain Sale Price by Application (2021-2026) & (US\$/Unit)

Table 34. Global Automotive Inverted-Tooth Chain Sales by Company (2021-2026) & (K Units)

Table 35. Global Automotive Inverted-Tooth Chain Sales Market Share by Company (2021-2026)

Table 36. Global Automotive Inverted-Tooth Chain Revenue by Company (2021-2026) & (\$ millions)

Table 37. Global Automotive Inverted-Tooth Chain Revenue Market Share by Company (2021-2026)

Table 38. Global Automotive Inverted-Tooth Chain Sale Price by Company (2021-2026) & (US\$/Unit)

Table 39. Key Manufacturers Automotive Inverted-Tooth Chain Producing Area Distribution and Sales Area

Table 40. Players Automotive Inverted-Tooth Chain Products Offered

Table 41. Automotive Inverted-Tooth Chain Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 42. New Products and Potential Entrants

Table 43. Market M&A Activity & Strategy

Table 44. Global Automotive Inverted-Tooth Chain Sales by Geographic Region (2021-2026) & (K Units)

Table 45. Global Automotive Inverted-Tooth Chain Sales Market Share Geographic Region (2021-2026)

Table 46. Global Automotive Inverted-Tooth Chain Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 47. Global Automotive Inverted-Tooth Chain Revenue Market Share by Geographic Region (2021-2026)

Table 48. Global Automotive Inverted-Tooth Chain Sales by Country/Region (2021-2026) & (K Units)

Table 49. Global Automotive Inverted-Tooth Chain Sales Market Share by Country/Region (2021-2026)

Table 50. Global Automotive Inverted-Tooth Chain Revenue by Country/Region (2021-2026) & (\$ millions)

Table 51. Global Automotive Inverted-Tooth Chain Revenue Market Share by Country/Region (2021-2026)

Table 52. Americas Automotive Inverted-Tooth Chain Sales by Country (2021-2026) & (K Units)

Table 53. Americas Automotive Inverted-Tooth Chain Sales Market Share by Country (2021-2026)

Table 54. Americas Automotive Inverted-Tooth Chain Revenue by Country (2021-2026) & (\$ millions)

Table 55. Americas Automotive Inverted-Tooth Chain Sales by Type (2021-2026) & (K Units)

Table 56. Americas Automotive Inverted-Tooth Chain Sales by Application (2021-2026) & (K Units)

Table 57. APAC Automotive Inverted-Tooth Chain Sales by Region (2021-2026) & (K Units)

Table 58. APAC Automotive Inverted-Tooth Chain Sales Market Share by Region (2021-2026)

Table 59. APAC Automotive Inverted-Tooth Chain Revenue by Region (2021-2026) & (\$ millions)

Table 60. APAC Automotive Inverted-Tooth Chain Sales by Type (2021-2026) & (K Units)

Table 61. APAC Automotive Inverted-Tooth Chain Sales by Application (2021-2026) & (K Units)

Table 62. Europe Automotive Inverted-Tooth Chain Sales by Country (2021-2026) & (K Units)

Table 63. Europe Automotive Inverted-Tooth Chain Revenue by Country (2021-2026) & (\$ millions)

Table 64. Europe Automotive Inverted-Tooth Chain Sales by Type (2021-2026) & (K

Units)

Table 65. Europe Automotive Inverted-Tooth Chain Sales by Application (2021-2026) & (K Units)

Table 66. Middle East & Africa Automotive Inverted-Tooth Chain Sales by Country (2021-2026) & (K Units)

Table 67. Middle East & Africa Automotive Inverted-Tooth Chain Revenue Market Share by Country (2021-2026)

Table 68. Middle East & Africa Automotive Inverted-Tooth Chain Sales by Type (2021-2026) & (K Units)

Table 69. Middle East & Africa Automotive Inverted-Tooth Chain Sales by Application (2021-2026) & (K Units)

Table 70. Key Market Drivers & Growth Opportunities of Automotive Inverted-Tooth Chain

Table 71. Key Market Challenges & Risks of Automotive Inverted-Tooth Chain

Table 72. Key Industry Trends of Automotive Inverted-Tooth Chain

Table 73. Automotive Inverted-Tooth Chain Raw Material

Table 74. Key Suppliers of Raw Materials

Table 75. Automotive Inverted-Tooth Chain Distributors List

Table 76. Automotive Inverted-Tooth Chain Customer List

Table 77. Global Automotive Inverted-Tooth Chain Sales Forecast by Region (2027-2032) & (K Units)

Table 78. Global Automotive Inverted-Tooth Chain Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 79. Americas Automotive Inverted-Tooth Chain Sales Forecast by Country (2027-2032) & (K Units)

Table 80. Americas Automotive Inverted-Tooth Chain Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 81. APAC Automotive Inverted-Tooth Chain Sales Forecast by Region (2027-2032) & (K Units)

Table 82. APAC Automotive Inverted-Tooth Chain Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 83. Europe Automotive Inverted-Tooth Chain Sales Forecast by Country (2027-2032) & (K Units)

Table 84. Europe Automotive Inverted-Tooth Chain Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Middle East & Africa Automotive Inverted-Tooth Chain Sales Forecast by Country (2027-2032) & (K Units)

Table 86. Middle East & Africa Automotive Inverted-Tooth Chain Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Global Automotive Inverted-Tooth Chain Sales Forecast by Type (2027-2032) & (K Units)

Table 88. Global Automotive Inverted-Tooth Chain Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 89. Global Automotive Inverted-Tooth Chain Sales Forecast by Application (2027-2032) & (K Units)

Table 90. Global Automotive Inverted-Tooth Chain Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 91. Tsubakimoto Chain Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 92. Tsubakimoto Chain Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 93. Tsubakimoto Chain Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 94. Tsubakimoto Chain Main Business

Table 95. Tsubakimoto Chain Latest Developments

Table 96. BorgWarner Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 97. BorgWarner Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 98. BorgWarner Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 99. BorgWarner Main Business

Table 100. BorgWarner Latest Developments

Table 101. iwis SE & Co Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 102. iwis SE & Co Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 103. iwis SE & Co Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 104. iwis SE & Co Main Business

Table 105. iwis SE & Co Latest Developments

Table 106. Daido Kogyo Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 107. Daido Kogyo Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 108. Daido Kogyo Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 109. Daido Kogyo Main Business

Table 110. Daido Kogyo Latest Developments

Table 111. Hangzhou Donghua Chain Group Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 112. Hangzhou Donghua Chain Group Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 113. Hangzhou Donghua Chain Group Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 114. Hangzhou Donghua Chain Group Main Business

Table 115. Hangzhou Donghua Chain Group Latest Developments

Table 116. L.G. Balakrishnan & Bros Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 117. L.G. Balakrishnan & Bros Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 118. L.G. Balakrishnan & Bros Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 119. L.G. Balakrishnan & Bros Main Business

Table 120. L.G. Balakrishnan & Bros Latest Developments

Table 121. Qingdao Choho Industrial Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 122. Qingdao Choho Industrial Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 123. Qingdao Choho Industrial Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 124. Qingdao Choho Industrial Main Business

Table 125. Qingdao Choho Industrial Latest Developments

Table 126. K.M.C Automobile Transmission Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 127. K.M.C Automobile Transmission Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 128. K.M.C Automobile Transmission Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 129. K.M.C Automobile Transmission Main Business

Table 130. K.M.C Automobile Transmission Latest Developments

Table 131. Ming Chang Traffic Parts Mfg. Co., Ltd. Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 132. Ming Chang Traffic Parts Mfg. Co., Ltd. Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 133. Ming Chang Traffic Parts Mfg. Co., Ltd. Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 134. Ming Chang Traffic Parts Mfg. Co., Ltd. Main Business

Table 135. Ming Chang Traffic Parts Mfg. Co., Ltd. Latest Developments

Table 136. Zhejiang Hengjiu Machinery Group Co., Ltd. Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 137. Zhejiang Hengjiu Machinery Group Co., Ltd. Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 138. Zhejiang Hengjiu Machinery Group Co., Ltd. Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 139. Zhejiang Hengjiu Machinery Group Co., Ltd. Main Business

Table 140. Zhejiang Hengjiu Machinery Group Co., Ltd. Latest Developments

Table 141. Hangzhou SFR Chain Technology Co., Ltd. Basic Information, Automotive Inverted-Tooth Chain Manufacturing Base, Sales Area and Its Competitors

Table 142. Hangzhou SFR Chain Technology Co., Ltd. Automotive Inverted-Tooth Chain Product Portfolios and Specifications

Table 143. Hangzhou SFR Chain Technology Co., Ltd. Automotive Inverted-Tooth Chain Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 144. Hangzhou SFR Chain Technology Co., Ltd. Main Business

Table 145. Hangzhou SFR Chain Technology Co., Ltd. Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Automotive Inverted-Tooth Chain
- Figure 2. Automotive Inverted-Tooth Chain Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Automotive Inverted-Tooth Chain Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Automotive Inverted-Tooth Chain Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Automotive Inverted-Tooth Chain Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Automotive Inverted-Tooth Chain Sales Market Share by Country/Region (2025)
- Figure 10. Automotive Inverted-Tooth Chain Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Round-Pin
- Figure 12. Product Picture of Rocker-Joint
- Figure 13. Product Picture of Rolling-Pin
- Figure 14. Product Picture of Others
- Figure 15. Global Automotive Inverted-Tooth Chain Sales Market Share by Type in 2026
- Figure 16. Global Automotive Inverted-Tooth Chain Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Small Pitch Class (?8mm)
- Figure 18. Product Picture of Medium Pitch Class (8mm)
- Figure 19. Product Picture of Large Pitch Class (?8mm)
- Figure 20. Global Automotive Inverted-Tooth Chain Sales Market Share by Pitch in 2026
- Figure 21. Global Automotive Inverted-Tooth Chain Revenue Market Share by Pitch (2021-2026)
- Figure 22. Product Picture of OEM Supply
- Figure 23. Product Picture of OES Service Parts
- Figure 24. Product Picture of Independent Aftermarket
- Figure 25. Product Picture of Others
- Figure 26. Global Automotive Inverted-Tooth Chain Sales Market Share by Sales

Channel in 2026

Figure 27. Global Automotive Inverted-Tooth Chain Revenue Market Share by Sales Channel (2021-2026)

Figure 28. Automotive Inverted-Tooth Chain Consumed in Passenger Vehicles

Figure 29. Global Automotive Inverted-Tooth Chain Market: Passenger Vehicles (2021-2026) & (K Units)

Figure 30. Automotive Inverted-Tooth Chain Consumed in Commercial Vehicles

Figure 31. Global Automotive Inverted-Tooth Chain Market: Commercial Vehicles (2021-2026) & (K Units)

Figure 32. Global Automotive Inverted-Tooth Chain Sale Market Share by Application (2025)

Figure 33. Global Automotive Inverted-Tooth Chain Revenue Market Share by Application in 2025

Figure 34. Automotive Inverted-Tooth Chain Sales by Company in 2025 (K Units)

Figure 35. Global Automotive Inverted-Tooth Chain Sales Market Share by Company in 2025

Figure 36. Automotive Inverted-Tooth Chain Revenue by Company in 2025 (\$ millions)

Figure 37. Global Automotive Inverted-Tooth Chain Revenue Market Share by Company in 2025

Figure 38. Global Automotive Inverted-Tooth Chain Sales Market Share by Geographic Region (2021-2026)

Figure 39. Global Automotive Inverted-Tooth Chain Revenue Market Share by Geographic Region in 2025

Figure 40. Americas Automotive Inverted-Tooth Chain Sales 2021-2026 (K Units)

Figure 41. Americas Automotive Inverted-Tooth Chain Revenue 2021-2026 (\$ millions)

Figure 42. APAC Automotive Inverted-Tooth Chain Sales 2021-2026 (K Units)

Figure 43. APAC Automotive Inverted-Tooth Chain Revenue 2021-2026 (\$ millions)

Figure 44. Europe Automotive Inverted-Tooth Chain Sales 2021-2026 (K Units)

Figure 45. Europe Automotive Inverted-Tooth Chain Revenue 2021-2026 (\$ millions)

Figure 46. Middle East & Africa Automotive Inverted-Tooth Chain Sales 2021-2026 (K Units)

Figure 47. Middle East & Africa Automotive Inverted-Tooth Chain Revenue 2021-2026 (\$ millions)

Figure 48. Americas Automotive Inverted-Tooth Chain Sales Market Share by Country in 2025

Figure 49. Americas Automotive Inverted-Tooth Chain Revenue Market Share by Country (2021-2026)

Figure 50. Americas Automotive Inverted-Tooth Chain Sales Market Share by Type (2021-2026)

Figure 51. Americas Automotive Inverted-Tooth Chain Sales Market Share by Application (2021-2026)

Figure 52. United States Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 53. Canada Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 54. Mexico Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 55. Brazil Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 56. APAC Automotive Inverted-Tooth Chain Sales Market Share by Region in 2025

Figure 57. APAC Automotive Inverted-Tooth Chain Revenue Market Share by Region (2021-2026)

Figure 58. APAC Automotive Inverted-Tooth Chain Sales Market Share by Type (2021-2026)

Figure 59. APAC Automotive Inverted-Tooth Chain Sales Market Share by Application (2021-2026)

Figure 60. China Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 61. Japan Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 62. South Korea Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 63. Southeast Asia Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 64. India Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 65. Australia Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 66. China Taiwan Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 67. Europe Automotive Inverted-Tooth Chain Sales Market Share by Country in 2025

Figure 68. Europe Automotive Inverted-Tooth Chain Revenue Market Share by Country (2021-2026)

Figure 69. Europe Automotive Inverted-Tooth Chain Sales Market Share by Type (2021-2026)

Figure 70. Europe Automotive Inverted-Tooth Chain Sales Market Share by Application

(2021-2026)

Figure 71. Germany Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 72. France Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 73. UK Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 74. Italy Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 75. Russia Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 76. Middle East & Africa Automotive Inverted-Tooth Chain Sales Market Share by Country (2021-2026)

Figure 77. Middle East & Africa Automotive Inverted-Tooth Chain Sales Market Share by Type (2021-2026)

Figure 78. Middle East & Africa Automotive Inverted-Tooth Chain Sales Market Share by Application (2021-2026)

Figure 79. Egypt Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 80. South Africa Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 81. Israel Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 82. Turkey Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 83. GCC Countries Automotive Inverted-Tooth Chain Revenue Growth 2021-2026 (\$ millions)

Figure 84. Manufacturing Cost Structure Analysis of Automotive Inverted-Tooth Chain in 2026

Figure 85. Manufacturing Process Analysis of Automotive Inverted-Tooth Chain

Figure 86. Industry Chain Structure of Automotive Inverted-Tooth Chain

Figure 87. Channels of Distribution

Figure 88. Global Automotive Inverted-Tooth Chain Sales Market Forecast by Region (2027-2032)

Figure 89. Global Automotive Inverted-Tooth Chain Revenue Market Share Forecast by Region (2027-2032)

Figure 90. Global Automotive Inverted-Tooth Chain Sales Market Share Forecast by Type (2027-2032)

Figure 91. Global Automotive Inverted-Tooth Chain Revenue Market Share Forecast by

Type (2027-2032)

Figure 92. Global Automotive Inverted-Tooth Chain Sales Market Share Forecast by Application (2027-2032)

Figure 93. Global Automotive Inverted-Tooth Chain Revenue Market Share Forecast by Application (2027-2032)

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