

# Global and China Automotive Transmission Industry Report, 2014-2018

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## Abstracts

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.

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.

## Contents

### **1. OVERVIEW OF AUTOMOTIVE TRANSMISSION INDUSTRY**

- 1.1 Introduction
- 1.2 Classification

### **2 GLOBAL TRANSMISSION MARKET**

- 2.1 Overview
  - 2.1.1 Size
  - 2.1.2 Structure
- 2.2 AT
  - 2.2.1 Major Manufacturers
  - 2.2.2 Supporting
  - 2.2.3 Production Bases
- 2.3 CVT
  - 2.3.1 Major Manufacturers
  - 2.3.2 Supporting
  - 2.3.3 Production Bases
- 2.4 AMT
- 2.5 DCT

### **3 OVERVIEW OF CHINESE AUTOMOTIVE TRANSMISSION MARKET**

- 3.1 Policy Environment
- 3.2 Status Quo
  - 3.2.1 Size
  - 3.2.2 Structure
- 3.3 Business Model
- 3.4 Import & Export
  - 3.4.1 Overall
  - 3.4.2 Bus Transmission
  - 3.4.3 Truck Transmission
  - 3.4.4 Sedan Transmission
- 3.5 Electric Vehicle Automatic Transmission

### **4 CHINESE PASSENGER VEHICLE TRANSMISSION MARKET**

- 4.1 Size and Structure
- 4.2 Manual Transmission Market
- 4.3 Automatic Transmission Market
  - 4.3.1 AT
  - 4.3.2 DCT
  - 4.3.3 CVT
  - 4.3.4 AMT
- 4.4 Production Capacity
- 4.5 Patent Protection
- 4.6 Development Trend

## **5 CHINESE COMMERCIAL VEHICLE TRANSMISSION MARKET**

- 5.1 Size and Structure
- 5.2 Manual Transmission Market
- 5.3 Automatic Transmission Market
- 5.4 Competitive Landscape
- 5.5 Supply Relationship
- 5.6 Development Trend

## **6 MAJOR GLOBAL TRANSMISSION MANUFACTURERS**

- 6.1 JATCO
- 6.2 Aisin
- 6.3 BorgWarner
- 6.4 ZF
- 6.5 GETRAG
- 6.6 Schaeffler
- 6.7 MagnetiMarelli
- 6.8 OerlikonGraziano
- 6.9 Delphi
- 6.10 Continental
- 6.11 Eaton

## **7 CHINESE AUTONOMOUS AUTOMOTIVE TRANSMISSION MANUFACTURERS**

- 7.1 Chongqing Tsingshan Industrial Co., Ltd.
- 7.2 Shaanxi Fast Auto Drive Group Co., Ltd
- 7.3 Zhejiang Wanliyang Transmission Co., Ltd.

- 7.3.1 Profile
- 7.3.2 Operation
- 7.3.3 Transmission Business
- 7.3.4 Major Customers
- 7.3.5 Raw Material Suppliers
- 7.4 Shandong Menwo Transmission Co., Ltd.
- 7.5 Anhui Xingrui Gear-transmission Co., Ltd.
- 7.6 Geely Group
- 7.7 Chery Automobile Co., Ltd.
- 7.8 Shanxi Datong Gear Group Co. Ltd
- 7.9 Hunan Jianglu&Rongda Vehicle Transmission Limited Company
- 7.10 Qijiang Gear Transmission Co., Ltd.
- 7.11 Shanghai Automobile Gear Works
- 7.12 Shengrui Transmission Corporation Limited

## **8 SINO-FOREIGN AUTOMOTIVE TRANSMISSION MANUFACTURERS**

- 8.1 Volkswagen Transmission
  - 8.1.1 Volkswagen Transmission (Shanghai) Co., Ltd.
  - 8.1.2 Volkswagen Automatic Transmission (Dalian) Co., Ltd.
  - 8.1.3 Volkswagen Automatic Transmission (Tianjin) Co., Ltd.
- 8.2 Aisin
  - 8.2.1 Tangshan Aisin Gear Co., Ltd.
  - 8.2.2 Tianjin AW Automatic Transmission Co., Ltd.
  - 8.2.3 AW Tianjin Automobile Parts Co., Ltd.
  - 8.2.4 AW Suzhou Automotive Parts Co., Ltd.
- 8.3 JATCO (Guangzhou) Automatic Transmission Ltd.
- 8.4 BorgWarner DualTronic Transmission Systems Co., Ltd.
- 8.5 Shanghai GM Dongyue Powertrain Co., Ltd.
- 8.6 GETRAG (Jiangxi) Transmission Co., Ltd.
  - 8.6.1 Nanchang Plant
  - 8.6.2 Ganzhou Plant
  - 8.6.3 Yudu Plant
- 8.7 Hangzhou Iveco Automobile Transmission Technology Co., Ltd.
- 8.8 Harbin DongAn Automotive Engine Manufacturing Co., Ltd.
- 8.9 Hunan Sino-German Automobile Automatic Transmission Co., Ltd
- 8.10 Toyota Motor (Changshu) Auto Parts Co., Ltd
- 8.11 Punch Powertrain Nanjing Co., Ltd.
- 8.12 Honda Auto Parts Manufacturing Co., Ltd.

## 8.13 ZF

8.13.1 ZF Transmissions Shanghai Co., Ltd.

8.13.2 ZF Drivtech (Hangzhou) Co. Ltd.

8.13.3 ZF Drivtech (Suzhou) Co., Ltd.

8.14 Beijing MOBIS Transmission Co., Ltd.

8.15 Inner Mongolia OED Engine Co., Ltd.

## **9 SUMMARY AND FORECAST**

### 9.1 Market

9.1.1 Size

9.1.2 Structure

### 9.2 Manufacturer

9.2.1 Production Capacity

9.2.2 Supporting

### 9.3 Development Direction

9.3.1 Route

9.3.2 Trend

## Selected Charts

### SELECTED CHARTS

Gears of Manual Transmission

Advantages and Disadvantages of Manual Transmission and Automatic Transmission

Technology Comparison among Main Manufacturers of Four Types of Automatic Transmissions

Gearing, Shift Modes and Features of All Types of Automatic Transmissions

Global Automotive Transmission Market Size, 2009-2018E

Demand Structure of Global Automotive Transmission Market by Country, 2009-2018E

Global Automotive Transmission Market Structure, 2015&2018

European Automotive Transmission Market Structure, 2015&2018

AT Suppliers for Japanese Automakers

AT Suppliers for U.S. Automakers

AT Suppliers for European Automakers

Production Bases of Major Global AT Suppliers

CVT Suppliers for Major Global Automakers

Production Bases of Major Global CVT Suppliers

AMT Suppliers for Japanese and South Korean Automakers

ATM Suppliers of European and U.S. Automakers

Trade Name and Type of DCT Adopted by Various Auto Brands

DCT Suppliers for Japanese and South Korean Automakers

DCT Suppliers for U.S. Automakers

DCT Suppliers for European Automakers

Main Policies on China Automotive Transmission Industry

Chinese Automotive Transmission Market Size, 2009-2018E

Chinese Automotive Transmission Market Structure, 2013-2018E

Supporting Modes of China Automotive Transmission Industry

Import/Export Value of Automotive Transmission and Parts in China, 2007-2015

Top10 Origins of Imported Automotive Transmission and Parts in China, 2014-2015

Top10 Destinations of Exported Automotive Transmission and Parts from China, 2014-2015

Import/Export Value of Transmission and Parts for 30-seat and above Motor Bus in China, 2007-2015

Top10 Origins of Imported Transmission and Parts for 30-seat and above Motor Bus in China, 2007-2015

Top10 Destinations of Exported Transmission and Parts for 30-seat and above Motor Bus from China, 2014-2015

Import/Export Value of Truck Transmission and Parts in China, 2007-2015  
Top10 Origins of Imported Truck Transmission and Parts in China, 2014-2015  
Top10 Destinations of Exported Truck Transmission and Parts in China, 2014-2015  
Import/Export Value of Sedan Automatic Transmission in China, 2007-2015  
Top10 Origins of Imported Sedan Automatic Transmission in China, 2014-2015  
Top10 Destinations of Exported Sedan Automatic Transmission from China, 2014-2015  
China's EV Sales Volume, 2011-2018E  
Chinese EV Automatic Transmission Research Companies  
Chinese Passenger Vehicle Transmission Market Size, 2013-2018E  
Chinese Passenger Vehicle Transmission Market Structure, 2013-2018  
Supporting Relationship between Chinese MT Companies and Automakers  
Main Passenger Vehicle Models Equipped with AT in China  
Capacity of Major Chinese AT Manufacturers and Automakers Supported, 2015  
Main Passenger Vehicle Models Equipped with DCT in China  
Capacity of Major Chinese DCT Manufacturers and Automakers Supported, 2015  
Main Passenger Vehicle Models Equipped with CVT in China  
Capacity of Major Chinese CVT Manufacturers and Automakers Supported, 2015  
Main Passenger Vehicle Models Equipped with AMT in China  
Capacity of Major Chinese AMT Manufacturers and Automakers Supported, 2015  
Passenger Vehicle Automatic Transmission's Share of Total Automatic Transmissions'  
Capacity in China, 2015  
Prospects for Independent R&D of Automatic Transmission  
Comparison of Share of Passenger Vehicle Equipped with Automatic Transmission at  
Home and Abroad  
Chinese Commercial Vehicle Transmission Market Size, 2013-2018E  
Chinese Commercial Vehicle Transmission Market Structure, 2013-2018E  
Internal Supply of Transmission in Major Chinese Heavy-duty Truck Companies  
Capacity of Major Chinese Commercial Vehicle Automatic Transmission Companies  
Market Share of Major Chinese Commercial Vehicle Automatic Transmission  
Companies, 2014  
Transmission Companies Serving Major Chinese Commercial Vehicle Makers  
Revenue, Operating Income and Net Income of JATCO, FY2010-FY2013  
JATCO's Local Production Bases in Japan  
JATCO's Overseas Factories  
JATCO's R&D Bases  
Sales and Profit of Aisin, FY2010-FY2015  
Aisin's Sales and Profit in Major Regions, FY2014-FY2016  
Sales Structure of Aisin by Segment, FY2014  
Aisin's Major Customers, FY2014-FY2016



Aisin's Transmission Output, FY2011-FY2014  
Aisin AW's Sales and Operating Income, FY2012-FY2016  
Aisin AI's Sales and Operating Income, FY2012-FY2016  
Aisin's Transmission Output, FY2013-F2016  
BorgWarner's Sales, 2012-2014  
BorgWarner's Major Customers, 2015  
ZF's Sales, 2000-2014  
Sales Breakdown of ZF by Region, 2010-2014  
Sales of ZF's Products, 2014  
GETRAG's Sales Volume, 2010-2013  
GETRAG's Sales Value, 2010-2013  
Number of Employees of GETRAG, 2010-2013  
Sales and EBIT of Schaeffler, 2008-2014  
Sales and Employee Structure of Schaeffler by Region, 2014  
Schaeffler's Revenue from Automotive Business, 2013-2014  
Schaeffler's Revenue from Transmission Business, 2013-2014  
Schaeffler's Major Customers in Auto Industry  
Business Performance of OerlikonGraziano, 2012-2014  
Revenue Structure of OerlikonGraziano, 2013-2014  
Sales and Net Income of Delphi, 2012-2014  
Forecast for Delphi's Performance, 2015  
Sales Breakdown of Delphi by Segment, 2012-2014  
Delphi's Major Customers, 2014  
Business Performance of Continental, 2011-2014  
Sales Structure of Continental by Segment, 2014  
Business Performance of Continental's Powertrain Segment, 2013-2014  
Eaton's Sales, 2010-2014  
Manual Transmission Assembly Output and Sales Volume of Chongqing Tsingshan Industrial and Auto Models Supported, 2006-2013  
Progress of Chongqing Tsingshan Industrial's New Energy Transmission Project as of May 2015  
Manual Transmission Assembly Output and Sales Volume of Shaanxi Fast Auto Drive Group and Auto Models Supported, 2006-2014  
Major Subsidiaries of Shaanxi Fast Auto Drive Group  
Revenue and Gross Margin of Zhejiang Wanliyang Transmission, 2009-2018E  
Revenue and Gross Margin of Zhejiang Wanliyang Transmission's Main Products, 2013-2014  
Automotive Transmission Output and Sales Volume of Zhejiang Wanliyang Transmission, 2011-2014

Top5 Customers of Zhejiang Wanliyang Transmission, 2014  
Top5 Raw Material Suppliers of Zhejiang Wanliyang Transmission, 2014  
Cost Structure of Zhejiang Wanliyang Transmission, 2013-2014  
Total Assets, Net Assets, Revenue and Net Income of Shandong Menwo Transmission, 2011-2014  
Manual Transmission Assembly Output and Sales Volume of Shandong Menwo Transmission and Auto Models Supported, 2006-2013  
Revenue of Anhui Xingrui Gear-transmission, 2001-2014  
Manual Transmission Assembly Output and Sales Volume of Anhui Xingrui Gear-transmission and Auto Models Supported, 2006-2014  
Chery Automobile's Models Equipped with CVT  
Manual Transmission Assembly Output and Sales Volume of Shanxi Datong Gear Group, 2006-2013  
Manual Transmission Assembly Output and Sales Volume of Shanghai Automobile Gear Works and Auto Models Supported, 2008-2013  
Manual Transmission Assembly Output and Sales Volume of VOLKSWAGEN Transmission (Shanghai) and Auto Models Supported, 2006-2013  
Transmission Sales Volume of Tangshan Aisin Gear, 2006-2013  
Sales of Tangshan Aisin Gear, 2006-2013  
Development History of JATCO (Guangzhou) Automatic Transmission  
Transmission Output and Sales Volume of Shanghai GM Dongyue Powertrain, 2011-2013  
Major Customers of Hangzhou Iveco Automobile Transmission Technology  
Major Transmissions of Hangzhou Iveco Automobile Transmission Technology  
Manual Transmission Assembly Output and Sales Volume of Hangzhou Iveco Automobile Transmission Technology and Auto Models Supported, 2011-2013  
Major Customers of ZF Drivtech (Suzhou)  
Growth Rate of Global and Chinese Automotive Transmission Market Size, 2010-2018E  
Supporting Rate of Automatic Transmission around the World and in China, 2010-2018E  
Global and China Automotive Transmission Market Structure, 2018E  
Product Type and Production Capacity of Major Chinese Transmission Manufacturers, 2015  
Transmission Supply Relationship between the World's Major Manufacturers  
Transmission Supply Relationship between China's Major Manufacturers  
Ways for Localization of Various Types of Automatic Transmissions

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