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Research Report on China's Passenger Vehicle Transmission Industry, 2018-2022

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Abstracts

Description

The market size of transmissions is expanding with the growth of global automobile production and sales. It is estimated that the market size of the global transmission system was approximately USD 150 billion in 2017 and will reach approximately USD 200 billion in 2022. With the upgrade of global automobile consumption, automatic transmissions are gradually replacing manual transmissions.

By operation mode, transmissions are classified into automatic transmissions and manual transmissions. By mechanism and principle, automatic transmissions can be classified into mechanical transmissions, dual-clutch transmissions, continuously variable transmissions and hydraulic transmissions. In 2017, the market share of hydraulic transmissions, continuously variable transmissions and dual-clutch transmissions was 33.3%, 16.9% and 16.1% respectively.

According to CRI, China ranked the first in automobile production and sales for nine consecutive years from 2009 to 2017. In 2017, the production volume of passenger vehicles in China was about 24.81 million units, accounting for about 85.5% of the total automobile production. In 2017, the sales volume of automatics accounted for more than 60%, or 10 million, of the sales volume of passenger vehicles in China. And the transmissions of these automobiles are mostly the products of multinational companies such as Aisin, ZF Friedrichshafen AG and BorgWarner. Some were made in China, and others were imported to China. The penetration rate of the automatic transmissions made by domestic manufacturers was lower than 10%.

According to CRI, most of the automatic transmissions of domestic brand automobiles rely on foreign technologies or imports. For example, Dongfeng Motor Corporation uses Aisin 6AT for passenger vehicles A9, AX7, L60, Getrag's dual-clutch transmissions for passenger vehicle AX5, and ZF Friedrichshafen AG's transmissions for its representative commercial vehicle Dongfeng KX. China FAW Group Corporation uses Aisin's automatic transmissions for its independent brands Hongqi and Besturn. The automatic transmissions of domestic brand coaches are mostly the products of Allison Transmission and ZF Friedrichshafen AG.

The main cause of the low market share of domestic automatic transmission manufacturers is that manual transmissions have developed for a long time in China and the technical process is relatively mature while automatic transmissions started late in China, and the core technologies and components are monopolized by a few international giants. Domestic enterprises still lag far behind the international advanced level. In addition, the automakers and the transmission suppliers have established stable cooperative relationships, which makes it more difficult for domestic manufacturers of automatic transmissions to get access to the market.

According to CRI, the penetration rate of automatic transmissions is expected to increase rapidly as the product positioning of domestic brand automobiles is upgraded in recent years. Foreign-funded and joint-venture transmission manufacturers have relatively closed supply chains that only serve bestselling high-end automobiles of independent brands. Other automakers' rigid demand for automatic transmissions provides great potential for domestic transmission enterprises. From 2018 to 2022, the sales volume of passenger vehicles in China will maintain a slow growth while the penetration rate of automatic transmissions will continue to grow. In 2022, the market size of passenger vehicle transmissions in China is expected to exceed CNY 200 billion.

Topics Covered:

- Development environment of global and China's passenger vehicle transmission industry
- Supply of and demand for passenger vehicle transmissions in China
- Competition in China's passenger vehicle transmission industry
- Major passenger vehicle transmission manufacturers in China
- Factors influencing the development of China's passenger vehicle transmission

industry

Prospect of China's passenger vehicle transmission industry from 2018 to 2022

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