

Automotive Automatic Transmission Market – Global Industry Size, Share, Trends Opportunity, and Forecast 2018-2028 Segmented By Vehicle Type (Passenger Car, Light Commercial Vehicles, and Medium & Heavy Commercial Vehicles), By Fuel Type (Gasoline, Diesel, and Hybrid), By Type (Automatic Transmission/Torque Converter, Automated Manual Transmission, Continuously Variable Transmission, and Dual Clutch Transmission), By Regional, Competition

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Abstracts

The Global Automotive Automatic Transmission Market size reached USD 108.4 billion in 2022 and is expected grow with a CAGR of 4.5% in the forecast period.

The Global Automotive Automatic Transmission Market is a dynamic and integral segment of the automotive industry, shaped by various factors and trends that influence its growth and evolution. Technological advancements are at the forefront of this market, with continuous innovation aimed at enhancing efficiency and performance. Modern automatic transmissions, such as dual-clutch and continuously variable transmissions (CVTs), are designed to improve fuel efficiency, driving comfort, and overall vehicle performance. Consumer preferences also play a pivotal role in shaping the market. A growing number of consumers in regions like North America, Europe, and parts of Asia prefer vehicles equipped with automatic transmissions due to their convenience and ease of use. This shifting consumer demand has resulted in a substantial increase in the adoption of automatic transmissions by automakers, leading

to a broader range of offerings in this category. Furthermore, the automotive industry's response to stringent global emissions regulations is influencing the development of automatic transmissions. Manufacturers are increasingly focusing on producing transmissions that contribute to lower emissions and improved environmental sustainability. This includes the integration of hybrid and electric powertrains with automatic transmissions to meet eco-friendly standards.

Additionally, the market is witnessing a surge in demand for automatic transmissions in emerging economies, driven by rising disposable incomes and urbanization. As more consumers in these regions seek enhanced driving experiences and convenience, the adoption of automatic transmissions is expected to grow significantly.

The Global Automotive Automatic Transmission Market is characterized by technological innovation, evolving consumer preferences, compliance with emissions regulations, and expanding demand in emerging economies. These factors collectively shape the landscape of this market and drive its continued growth and development in the automotive sector.

Key Market Drivers

Consumer Preference for Automatic Transmissions

A key driver is the growing preference among consumers for vehicles equipped with automatic transmissions. Automatic transmissions offer ease of use, particularly in congested urban traffic, making them highly desirable in regions like North America, Europe, and parts of Asia. This consumer preference has resulted in increased demand for automatic transmissions across various vehicle segments.

Technological Advancements

Ongoing technological advancements in automatic transmission systems are a driving force. Innovations such as dual-clutch transmissions, continuously variable transmissions (CVTs), and advanced electronic control units have led to improvements in fuel efficiency, performance, and driving comfort. Automakers are investing in research and development to introduce more efficient and responsive transmission technologies.

Fuel Efficiency and Emissions Compliance

The pursuit of better fuel efficiency and emissions compliance is a prominent driver. Stricter global emissions regulations are encouraging automakers to adopt automatic transmissions to optimize engine performance and reduce emissions. The integration of automatic transmissions with hybrid and electric powertrains further contributes to meeting environmental standards.

Urbanization and Traffic Congestion

Rapid urbanization in emerging economies has led to increased traffic congestion in cities. Automatic transmissions offer convenience in stop-and-go traffic, making them popular choices for urban commuters. As urbanization continues, the demand for automatic transmissions is expected to rise, particularly in densely populated regions.

Enhanced Driving Experience

Consumers seek an enhanced driving experience, and automatic transmissions provide smoother gear shifts and improved acceleration, resulting in a more enjoyable driving experience. This factor influences purchasing decisions, especially in premium and luxury vehicle segments, where driving comfort is a priority.

Expanding Middle-Class Population

The expanding middle-class population in emerging markets has boosted car ownership. Many of these consumers prefer vehicles with automatic transmissions due to their user-friendly nature. As disposable incomes continue to rise, automatic transmissions are becoming more accessible to a broader consumer base.

Increased Vehicle Sales

Overall growth in vehicle sales, including passenger cars, SUVs, and light commercial vehicles, contributes to the demand for automatic transmissions. Automakers are increasingly incorporating automatic transmissions into their vehicle lineups to cater to diverse customer preferences, further propelling market growth.

Market Expansion in Emerging Economies

Emerging economies in Asia, Latin America, and Africa are witnessing significant market expansion. As these regions experience economic development, rising urbanization, and improved infrastructure, more consumers are opting for automatic

transmission-equipped vehicles. This expansion presents lucrative opportunities for automakers and transmission suppliers to tap into new markets.

The Global Automotive Automatic Transmission Market is driven by consumer preferences, technological advancements, fuel efficiency and emissions compliance, urbanization, an enhanced driving experience, expanding middle-class populations, increased vehicle sales, and market expansion in emerging economies. These drivers collectively shape the industry's landscape and drive its growth in the automotive sector.

Key Market Challenges

Increasing Electrification

The growing shift towards electric vehicles (EVs) poses a challenge to the automatic transmission market. EVs use single-speed transmissions or direct-drive systems, eliminating the need for traditional automatic transmissions. As EV adoption rises, automatic transmission suppliers must adapt their strategies to remain relevant in a changing automotive landscape.

Emissions and Fuel Efficiency Standards

Stricter emissions regulations and fuel efficiency standards require automakers to focus on reducing vehicle emissions. While automatic transmissions can enhance fuel efficiency, they also introduce additional weight and complexity to vehicles. Balancing these factors to meet regulatory requirements presents a challenge for manufacturers.

Electrified Transmission Development

As hybrid and plug-in hybrid vehicles gain popularity, developing efficient and reliable electrified transmissions becomes essential. Hybrid systems combine electric and internal combustion engines, necessitating complex transmission solutions. Meeting the performance and durability expectations of consumers is a significant challenge.

Cost Pressure

The cost of automatic transmissions can be high due to their complexity and the use of precision components. Automakers are under constant pressure to reduce production costs and offer affordable vehicles to consumers. Striking a balance between cost reduction and maintaining transmission quality is a persistent challenge.

Technological Complexity

The integration of advanced technologies, such as dual-clutch transmissions and continuously variable transmissions (CVTs), has made automatic transmissions more complex. Ensuring the reliability and durability of these sophisticated systems while meeting consumer demands for smoother performance is a technical challenge for manufacturers.

Electric Vehicle Range Anxiety

For hybrid and plug-in hybrid vehicles, maintaining electric-only modes and maximizing range is crucial. Automatic transmissions must be optimized to seamlessly transition between electric and internal combustion modes, addressing range anxiety concerns. Achieving this balance is challenging but necessary for consumer acceptance.

Changing Consumer Preferences

While automatic transmissions remain popular, changing consumer preferences, including a resurgence of interest in manual transmissions and CVTs, can be challenging to predict. Automakers must adapt their transmission offerings to align with shifting preferences, leading to inventory management challenges.

Supply Chain Disruptions

The automotive industry, including transmission manufacturers, is susceptible to supply chain disruptions, such as those seen during the COVID-19 pandemic. These disruptions can affect production schedules, lead times, and component availability, leading to challenges in meeting market demands.

The Global Automotive Automatic Transmission Market faces challenges related to electrification, emissions standards, electrified transmission development, cost pressures, technological complexity, electric vehicle range anxiety, changing consumer preferences, and supply chain disruptions. Successfully navigating these challenges is critical for the continued growth and relevance of the automatic transmission sector in the automotive industry.

Key Market Trends

Electrification Integration

One of the most significant trends is the integration of automatic transmissions into electric and hybrid vehicles. As electrification gains momentum, automakers are developing hybrid and plug-in hybrid models equipped with automatic transmissions to provide efficient power transfer and enhance overall vehicle performance.

Dual-Clutch Transmissions (DCTs)

Dual-clutch transmissions are gaining popularity due to their ability to provide quick and smooth gear changes. DCTs offer the best of both manual and automatic transmissions, delivering improved fuel efficiency and driving dynamics. This trend is especially prominent in high-performance and luxury vehicle segments.

Continuously Variable Transmissions (CVTs)

CVTs are becoming more common, primarily in compact and midsize vehicles. Their ability to continuously adjust the gear ratio offers a smoother driving experience and improved fuel efficiency. Automakers are adopting CVTs to meet stricter emissions standards and enhance the overall efficiency of their fleets.

Focus on Fuel Efficiency

The pursuit of better fuel efficiency remains a significant trend. Automatic transmission manufacturers are continually refining their designs to reduce energy losses and optimize power transfer. This includes the development of advanced torque converter lock-up clutches and more efficient hydraulic systems.

Enhanced Transmission Control

Advanced electronic control units (ECUs) are increasingly being used to fine-tune transmission performance. These systems enhance shift quality, adapt to driving conditions, and support features like adaptive cruise control and semi-autonomous driving. Such enhancements contribute to a more comfortable and efficient driving experience.

Increased Use of Lightweight Materials

Automakers and transmission manufacturers are incorporating lightweight materials

such as aluminum and advanced alloys to reduce transmission weight. Lighter transmissions improve vehicle efficiency and help meet emissions targets.

Globalization of Transmission Platforms

To optimize production costs, automakers are developing standardized transmission platforms that can be used across multiple vehicle models and regions. This trend streamlines manufacturing processes and improves economies of scale.

Continued Growth in Emerging Markets

The adoption of automatic transmissions is expanding in emerging markets, driven by rising incomes and urbanization. As more consumers in these regions seek enhanced driving experiences, automakers are introducing automatic transmissions in entry-level and affordable vehicles, contributing to market growth.

The Global Automotive Automatic Transmission Market is witnessing trends such as electrification integration, the prominence of DCTs and CVTs, a focus on fuel efficiency, enhanced transmission control, lightweight materials usage, globalization of transmission platforms, and continued growth in emerging markets. These trends collectively reflect the industry's commitment to innovation, efficiency, and meeting the evolving needs of consumers and regulatory standards.

Segmental Insights

The market is segmented by vehicle type, encompassing passenger cars, light commercial vehicles (LCVs), and Medium & Heavy Commercial Vehicles (HCVs). Passenger cars hold the largest share due to their high production volume and consumer demand for automatic transmissions. LCVs are increasingly adopting automatic transmissions to provide better driving comfort and fuel efficiency. HCVs also show potential, especially in regions where automatic transmissions are becoming more common in commercial Fuel Types. The market is segmented by vehicle type, encompassing passenger cars, light commercial vehicles (LCVs), and Medium & Heavy Commercial Vehicles (HCVs). Passenger cars hold the largest share due to their high production volume and consumer demand for automatic transmissions. LCVs are increasingly adopting automatic transmissions to provide better driving comfort and fuel efficiency. HCVs also show potential, especially in regions where automatic transmissions are becoming more common in commercial Fuel Types.

The choice of transmission is influenced by the fuel type of the vehicle. In the context of the growing electrification trend, automatic transmissions are integrated into hybrid and electric vehicles (EVs). These transmissions are engineered to work in harmony with electric powertrains, enhancing overall vehicle efficiency and performance. Additionally, internal combustion engine (ICE) vehicles, both gasoline and diesel, continue to use automatic transmissions to optimize power transfer and fuel economy. The market's regional segmentation reflects varying adoption rates and preferences. North America and Europe have long favored automatic transmissions, particularly in passenger cars. In contrast, regions like Asia-Pacific and Latin America are witnessing rapid growth in the adoption of automatic transmissions, driven by consumer preferences, urbanization, and increased purchasing power. Technological advancements are a significant driver in the automatic transmission market. Segmentation based on technology includes traditional hydraulic transmissions and advanced electronically controlled transmissions. The latter, equipped with sophisticated electronic control units (ECUs), offer improved shift quality, adaptability to driving conditions, and support for features like adaptive cruise control and semi-autonomous driving. The market distinguishes between transmissions designed for commercial vehicles and those for passenger vehicles. Commercial vehicle transmissions, typically found in trucks and buses, are engineered to withstand heavy-duty usage and provide the necessary torque and reliability. Passenger vehicle transmissions focus on delivering smooth and comfortable rides, catering to consumer preferences for convenience and efficiency. These segmental insights provide a comprehensive view of the Global Automotive Automatic Transmission Market's complexity, showcasing the diverse Fuel Types, technologies, and regional variations that influence its growth and development. Manufacturers and suppliers in this market must adapt their strategies to cater to the unique needs and preferences of each segment, ensuring relevance and competitiveness.

Regional Insights

North America, particularly the United States, is a prominent market for automatic transmissions. The preference for automatic transmissions in passenger cars and light trucks is well-established. In the U.S., the majority of new vehicles are equipped with automatic transmissions due to their convenience and ease of use. Additionally, there is a growing interest in automatic transmissions for commercial vehicles, especially in the medium and heavy-duty truck segments, as they offer improved fuel efficiency and driver comfort.

Europe is another significant market for automatic transmissions, where they are widely adopted in passenger cars, including compact and luxury segments. Dual-clutch

transmissions (DCTs) have gained popularity, especially in high-performance vehicles. In addition to conventional automatic transmissions, Europe has seen an increasing adoption of continuously variable transmissions (CVTs) and hybrid powertrains with automatic transmissions to meet stringent emissions regulations. The Asia-Pacific region is experiencing robust growth in the adoption of automatic transmissions. Countries like China, India, and Japan have witnessed a surge in consumer preference for automatic transmissions, particularly in urban areas with heavy traffic congestion. The market here spans passenger cars, commercial vehicles, and electric vehicles (EVs), as automakers increasingly integrate automatic transmissions into hybrid and electric powertrains to enhance efficiency and driving comfort. Latin America presents a diverse market for automatic transmissions. In countries like Brazil and Mexico, automatic transmissions are gaining popularity, primarily in passenger cars and SUVs. Urbanization and rising disposable incomes have contributed to this trend. Moreover, there is a growing market for automatic transmissions in commercial vehicles, such as buses and delivery trucks, as they offer advantages in terms of driver fatigue and fuel efficiency.

MEA exhibits a varied market for automatic transmissions. While some regions show a preference for manual transmissions, there is a notable demand for automatic transmissions in high-end passenger vehicles, luxury cars, and SUVs. The use of automatic transmissions in heavy-duty commercial vehicles is also on the rise in certain parts of the Middle East. Emerging markets across Asia, Latin America, and Africa are witnessing a significant shift toward automatic transmissions. Rapid urbanization, increased traffic congestion, and improving economic conditions are driving consumers in these regions to choose automatic transmissions for their convenience and enhanced driving experience. This trend has made emerging markets critical for the growth of the automatic transmission market.

The regional insights into the Global Automotive Automatic Transmission Market reveal a diverse landscape with varying levels of adoption, preferences, and regulatory factors. Manufacturers and suppliers in this industry must tailor their offerings to meet the specific demands of each region, whether it involves passenger cars, commercial vehicles, or emerging trends like electrification and advanced transmission technologies.

Key Market Players

Aisin Seiki Co Ltd

Allison Transmission Holdings

BorgWarner Inc.

Continental AG

Daimler AG

Delphi Automotive

Eaton Corporation PLC

Fiat Powertrain Technologies

Jatco Ltd.

Magna International Inc.

Report Scope:

In this report, the Global Automotive Automatic Transmission Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Automatic Transmission Market, By Vehicle Type:

Passenger Car

Light Commercial Vehicles

Medium & Heavy Commercial Vehicles

Automotive Automatic Transmission Market, By Fuel Type:

Gasoline

Diesel

Hybrid

Automotive Automatic Transmission Market, By Type:

Automatic Transmission/Torque Converter

Automated Manual Transmission

Continuously Variable Transmission

Dual Clutch Transmission

Automotive Automatic Transmission Market, By Region:

North America

United States

Canada

Mexico

Europe & CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

Asia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automotive Automatic Transmission Market.

Available Customizations:

Automotive Automatic Transmission Market – Global Industry Size, Share, Trends Opportunity, and Forecast 2018-...

Global Automotive Automatic Transmission Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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