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Global Automotive Modular Platform Sharing Market Analysis 2013-2023

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Abstracts

The trend of extremely modular and versatile automotive platforms started relatively recently with the first models coming to market in 2011 and 2012. As carmakers continue to compete on cost-effectiveness to retain profit margins many will launch one or more modular platforms in the next ten years. Consequently the amount of unit sales based on modular platforms will expand. Visiongain has assessed that sales of vehicles based upon modular platforms will reach 2.1 million units globally in 2013.

The global automotive modular platform sharing market consists of all the new platforms carmakers are introducing to be versatile enough to fit a wide variety of different models from different size and price segments. Because of the differences between carmakers in terms of structure, strategy, product-portfolio and R&D budget, every company takes a slightly different approach. Precise definitions therefore vary as to what constitutes a modular platform. Although the difference between a traditional platform and a modular one can be a grey area, it is safe to say that all automotive platforms are becoming increasingly modular.

The level of modularity that is necessary and financially feasible differs between carmakers. Large conglomerates such as VAG that have a substantial product portfolio with relatively little differentiation aim for high levels of modularity. Meanwhile smaller companies such as Volvo and Jaguar-Land Rover have a smaller product range but a wider variety in size. For these types of companies developing their own fully modular platforms is not cost-effective for all models as production number would be too small and the range of models too narrow.

The process of finding a suitable level of modularity for new platforms is going on throughout the automotive industry. One prevailing trend, however, is that all R&D

projects are becoming more modular. The main underlying causes of this are the general consolidation of the industry and the continuously growing number of global vehicle sales. Standardisation and economies of scale are essential for success in the automotive industry, traditionally known for its thin profit margins.

There are nevertheless important players in the automotive industry that do not have plans to embrace the modular platform strategy yet. Toyota and Hyundai-Kia, for example, already have a high level of flexibility in its manufacturing method through its use of 'lean production' which incorporates a just-in-time strategy and allows production of different models on the same production line. Furthermore the Japanese and Korean giants have a wide range of models in each size category. These factors mean that these companies can obtain cost effective production with a larger number of differently sized traditional platforms and would have less to gain from developing one resizable modular platform. Despite this, Toyota and Hyundai-Kia are implementing significant standardisation programs in order to obtain the cost savings that other manufacturers obtain through their modular platforms.

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Contents

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7. CONCLUSIONS

8. GLOSSARY

List Of Tables

LIST OF TABLES

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List Of Figures

LIST OF FIGURES

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Avtovaz
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Chery
Chrysler
Daimler AG
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Fuji (Subaru)
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Hawtai
Honda
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JAC Motors
Jaguar-Land Rover
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