

Global Automotive Modular Platform Sharing Market Analysis 2013-2023

<https://marketpublishers.com/r/G33074FFDCCEN.html>

Date: August 2013

Pages: 101

Price: US\$ 2,635.00 (Single User License)

ID: G33074FFDCCEN

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

1. EXECUTIVE SUMMARY

- 1.1 Benefits of This Report
- 1.2 Who is This Report For?
- 1.3 Methodology
- 1.4 Global Automotive Modular Platform Sharing Market Overview
- 1.5 Global Automotive Modular Platform Sharing Market Forecast 2013-2023
- 1.6 Leading Companies in the Automotive Modular Platform Sharing Market Forecasts 2013-2023

2. INTRODUCTION TO THE GLOBAL AUTOMOTIVE MODULAR PLATFORM SHARING MARKET

- 2.1 Restraints of the Global Automotive Modular Platform Sharing Market 2013-2023
- 2.2 Global Automotive Modular Platform Sharing Market Structure Overview
- 2.3 Automotive Modular Platform Sharing Market Definition

3. GLOBAL AUTOMOTIVE MODULAR PLATFORM SHARING MARKET FORECAST 2013-2023

- 3.1 Global Automotive Modular Platform Sharing Market Overview 2013-2023
- 3.2 Global Automotive Modular Platform Sharing Market Drivers & Restraints 2013-2023
- 3.3 Global Automotive Modular Platform Sharing Market Development Overview 2013-2023
- 3.4 Global Automotive Modular Platform Sharing Strategy Overview 2013-2023

4. LEADING AUTOMOTIVE MODULAR PLATFORM SHARING COMPANIES FORECASTS 2013-2023

- 4.1 Leading Automotive Modular Platform Sharing Companies Market Share Forecast 2013-2023
- 4.2 Volkswagen Audi Group's MQB Platform
 - 4.2.1 Volkswagen Audi Group's MQB Platform Drivers & Restraints 2013-2023
 - 4.2.2 Volkswagen Audi Group's MQB Platform Overview
 - 4.2.3 Future Model Launches and Overall Unit Sales of Volkswagen Audi Group's MQB Platform

- 4.2.4 Volkswagen Audi Group's MQB Platform Drivers & Restraints 2013-2023
- 4.2.5 Best Selling Models on Volkswagen Audi Group's MQB Platform 2012
- 4.2.6 Future Models on Volkswagen Audi Group's MQB Platform 2012
- 4.3 Renault-Nissan's CMF Platform
 - 4.3.1 Renault-Nissan's CMF Platform Drivers & Restraints 2013-2023
 - 4.3.2 Renault-Nissan's CMF Platform Overview
 - 4.3.3 Future Model Launches and Overall Unit Sales of Renault-Nissan's CMF Platform
 - 4.3.4 CMF Platform Best Selling Models
 - 4.3.5 Future Models on Renault-Nissan's CMF Platform
- 4.4 General Motors' DII Platform
 - 4.4.1 General Motors' DII Platform Drivers & Restraints 2013-2023
 - 4.4.2 General Motors' DII Platform Overview
 - 4.4.3 General Motors' DII Platform Sales Forecast
 - 4.4.4 Best Selling Models on General Motors' DII Platform 2012
 - 4.4.5 Best Selling Models on General Motors' DII Platform
- 4.5 Daimler AG's MFA and MRA Platforms
 - 4.5.1 Daimler AG's MFA and MRA Platforms Drivers & Restraints 2013-2023
 - 4.5.2 Daimler AG's MFA and MRA Platforms Overview
 - 4.5.3 Future Model Launches and Overall Unit Sales of Volkswagen Audi Group's MQB Platform
 - 4.5.4 Best Selling Models on Daimler AG's MFA and MRA Platforms 2012
 - 4.5.5 Future Models Daimler AG's MFA and MRA Platforms
- 4.6 PSA's EMPII Platform
 - 4.6.1 PSA's EMPII Platform Drivers & Restraints 2013-2023
 - 4.6.2 PSA Group's EMPII Platform Overview
 - 4.6.3 PSA's EMPII Platform's Development
 - 4.6.4 Best Selling Models on PSA's EMPII Platform 2012
 - 4.6.5 Future Models on PSA's EMPII Platform
- 4.7 BMW's UKL Platform
 - 4.7.1 BMW's UKL Platform Drivers & Restraints 2013-2023
 - 4.7.2 BMW's UKL Platform Overview
 - 4.7.3 Overall Unit Sales of BMW's UKL Platform
 - 4.7.4 Best Selling Models on BMW's UKL Platform
 - 4.7.5 Future Models on BMW's UKL Platform
- 4.8 Volvo's SPA Platform
 - 4.8.1 Volvo's SPA Platform Drivers & Restraints 2013-2023
 - 4.8.2 Volvo's SPA Platform Overview
 - 4.8.3 Unit Sales and Developments of Volvo's SPA Platform

4.8.4 Best Selling Models on Volvo's SPA Platform

4.8.5 Future Models on Volvo's SPA Platform

5. SWOT ANALYSIS OF THE AUTOMOTIVE MODULAR PLATFORM SHARING MARKET 2013-2023

6. OTHER LEADING COMPANIES IN THE AUTOMOTIVE MODULAR PLATFORM SHARING MARKET

6.1 Chrysler

6.1.1 Chrysler Company Overview

6.1.2 Chrysler's Platform Strategies

6.2 Ford Company Overview

6.2.1 Ford Company Overview

6.2.2 Ford's Platform Strategy

6.2.3 Ford J-V Activity

6.3 Fiat Company Overview

6.3.1 Fiat Company Overview

6.3.2 Fiat's Platform Strategy

6.4 Honda Company Overview

6.4.1 Honda Company Overview

6.4.2 Honda's Platform Strategies

6.4.3 Honda J-V Activity

6.5 Hyundai-Kia Company Overview

6.5.1 Hyundai-Kia Company Overview

6.5.2 Hyundai-Kia's Platform Strategy

6.6 Jaguar - Land Rover Company Overview

6.6.1 Jaguar - Land Rover Company Overview

6.6.2 Jaguar - Land Rover's Platform Strategy

6.7 Suzuki Company Overview

6.7.1 Suzuki Company Overview

6.7.2 Suzuki's Platform Strategy

6.7.3 Suzuki J-V Activity

6.8 Toyota Company Overview

6.8.1 Toyota Company Overview

6.8.2 Toyota's Platform Strategy

6.8.3 Toyota J-V Activity

6.9 Other Leading Companies in the Market

7. CONCLUSIONS

7.1 Market Outlook of the Global Automotive Modular Platform Sharing Market
2013-2023

7.2 Drivers & Restraints of the Global Automotive Modular Platform Sharing Market
2013-2023

7.2.1 Drivers of the Global Automotive Modular Platform Sharing Market 2013-2023

7.2.2 Restraints of the Global Automotive Modular Platform Sharing Market 2013-2023

7.3 Global Automotive Modular Platform Sharing Market Forecast 2013-2023

7.4 Leading Companies in the Automotive Modular Platform Sharing Market Forecasts
2013-2023

7.5 Market Overview

8. GLOSSARY

List Of Tables

LIST OF TABLES

Table 1.1 Global Automotive Modular Platform Sharing Market Forecast Summary 2013, 2018, 2023 (Units 000s, CAGR %)

Table 1.2 Leading Companies in the Automotive Modular Platform Sharing Market Forecast Summary 2013, 2018, 2023 (Units 000s, CAGR %)

Table 3.1 Global Automotive Modular Platform Sharing Market Forecast 2013-2023 (Units 000s, AGR %, CAGR%, Cumulative)

Table 3.2 Global Automotive Modular Platform Sharing Market Drivers & Restraints 2013-2023

Table 4.1 Leading Automotive Modular Platform Sharing Companies Forecasts 2013-2023 (Units 000s, AGR %)

Table 4.2 Volkswagen Audi Group's MQB Platform Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.3 Volkswagen Audi Group's MQB Platform Drivers & Restraints 2013-2023

Table 4.4 Best Selling Models on MQB Platform 2012 Global Sales (units)

Table 4.5 Renault-Nissan's CMF Platform Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.6 Renault-Nissan's CMF Platform Drivers & Restraints 2013-2023

Table 4.7 Best Selling Models on CMF Platform 2012 Global Sales (units)

Table 4.8 General Motors' DII Platform Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.9 General Motors' DII Platform Drivers & Restraints 2013-2023

Table 4.10 Best Selling Models on GM's D2 Platform 2012 Global Sales (units)

Table 4.11 Daimler AG's MFA and MRA Platforms Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.12 Daimler AG's MFA and MRA Platforms Drivers & Restraints 2013-2023

Table 4.13 Best Selling Models on Daimler AG's MFA and MRA Platforms 2012 Global Sales (units)

Table 4.14 PSA's EMP II Platform Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.15 PSA's EMP II Platform Drivers & Restraints 2013-2023

Table 4.16 Best Selling Models on PSA's EMP II Platform 2012 Global Sales (units)

Table 4.17 BMW's UKL Platform Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.18 BMW's UKL Platform Drivers & Restraints 2013-2023

Table 4.19 Best Selling Models on UKL Platform 2012 Global Sales (units)

Table 4.20 Volvo's SPA Platform Sales Forecast 2013-2023 (Units 000s, AGR %, CAGR%)

Table 4.21 Volvo's SPA Platform Drivers & Restraints 2013-2023

Table 4.22 Best Selling Models on Volvo's SPA Platform 2012 Global Sales (units)

Table 5.1 SWOT Analysis of the Automotive Modular Platform Sharing Market 2013-2023

Table 6.1 Chrysler Company Overview 2012 (Total Revenue, HQ, Ticker, Contact, Website)

Table 6.2 Ford Company Overview 2012 (Total Revenue, HQ, Ticker, IR Contact, Website)

Table 6.3 Fiat Company Overview 2012 (Total Revenue, HQ, Ticker, IR Contact, Website)

Table 6.4 Honda Company Overview 2012 (Total Revenue, HQ, Ticker, IR Contact, Website)

Table 6.5 Hyundai-Kia Company Overview 2012 (Total Revenue, HQ, Ticker, IR Contact, Website)

Table 6.6 Jaguar - Land Rover Company Overview 2012 (Total Sales, Sales in Market, % Sales From Market, HQ, Ticker, Contact, Website)

Table 6.7 Suzuki Company Overview 2012 (Total Revenue, HQ, Ticker, IR Contact, Website)

Table 6.8 Toyota Company Overview 2012 (Total Revenue, HQ, Ticker, IR Contact, Website)

Table 6.9 Other Leading Companies in the Market 2013 (Company, Country)

Table 7.1 Global Automotive Modular Platform Sharing Market Drivers & Restraints

Table 7.2 Global Automotive Modular Platform Sharing Market Forecast Summary 2013, 2018, 2023 (Units 000s, CAGR %)

Table 7.3 Leading Companies in the Global Automotive Modular Platform Sharing Market 2013, 2018, 2023 (000s, CAGR %)

List Of Figures

LIST OF FIGURES

Figure 2.1 Global Automotive Modular Platform Sharing Market Structure Overview

Figure 3.1 Global Automotive Modular Platform Sharing Market Forecast 2013-2023
(Units 000s, AGR%)

Figure 4.1 Leading National Automotive Modular Platform Sharing Markets Forecast
2013-2023 (Units 000s)

Figure 4.2 Leading Automotive Modular Platform Sharing Companies Market Share
Forecast 2013 (%)

Figure 4.3 Leading Automotive Modular Platform Sharing Companies Market Share
Forecast 2018 (%)

Figure 4.4 Leading Automotive Modular Platform Sharing Companies Market Share
Forecast 2023 (%)

Figure 4.5 Volkswagen Audi Group's MQB Platform Sales Forecast 2013-2023 (Units
000s, AGR % on Logarithmic Scale)

Figure 4.6 MQB Platform Share of Global Automotive Modular Platform Sharing Market
Forecast 2013-2023 (% Share)

Figure 4.7 Basic Structure of Volkswagen Audi Group's MQB Platform 2013

Figure 4.8 Major Models Share of Volkswagen Audi Group's MQB Platform 2013 Figure

4.9 Major Models Share of Volkswagen Audi Group's MQB Platform 2018 (%)

Figure 4.10 Major Models Share of Volkswagen Audi Group's MQB Platform 2023 (%)

Figure 4.11 Major Models on Volkswagen Audi Group's MQB Platform 2013-2023 (Unit
Sales (000s))

Figure 4.12 Renault-Nissan's CMF Platform Sales Forecast 2013-2023 (Units 000s,
AGR % on Logarithmic Scale)

Figure 4.13 Renault-Nissan's CMF Platform Share of Global Automotive Modular
Platform Sharing Market Forecast 2013-2023 (% Share)

Figure 4.14 Major Models Share of Renault-Nissan's CMF Platform 2013 (%)

Figure 4.15 Major Models Share of Renault-Nissan's CMF Platform 2018 (%)

Figure 4.16 Major Models Share of Renault-Nissan's CMF Platform 2023 (%)

Figure 4.17 Major Models on Renault-Nissan's CMF Platform 2013-2023 (Unit Sales
(000s))

Figure 4.18 General Motors' DII Platform Sales Forecast 2013-2023 (Units 000s, AGR
% on Logarithmic Scale)

Figure 4.19 General Motors' DII Platform Share of Global Automotive Modular Platform
Sharing Market Forecast 2013-2023 (% Share)

Figure 4.20 Major Models Share of GM's D2 Platform 2018 (%)

Figure 4.21 Major Models Share of GM's D2 Platform 2023 (%)

Figure 4.22 Major Models on General Motors' DII Platform 2013-2023 (Unit Sales (000s))

Figure 4.23 Daimler AG's MFA and MRA Platforms Sales Forecast 2013-2023 (Units 000s, AGR % on Logarithmic Scale)

Figure 4.24 Daimler AG's MFA and MRA Platforms Share of Global Automotive Modular Platform Sharing Market Forecast 2013-2023 (% Share)

Figure 4.25 Major Models Share of Daimler AG's MFA and MRA Platforms 2013 (%)

Figure 4.26 Major Models Share of Daimler AG's MFA and MRA Platforms 2018 (%)

Figure 4.27 Major Models Share of Daimler AG's MFA and MRA Platforms 2023 (%)

Figure 4.28 Major Models on Daimler AG's MFA and MRA Platforms 2013-2023 (Unit Sales (000s))

Figure 4.29 PSA's EMPII Platform Sales Forecast 2013-2023 (Units 000s, AGR % on Logarithmic Scale)

Figure 4.30 PSA's EMPII Platform Share of Global Automotive Modular Platform Sharing Market Forecast 2013-2023 (% Share)

Figure 4.31 Major Models Share of PSA's EMPII Platform 2013 (%)

Figure 4.32 Major Models Share of PSA's EMPII Platform 2018 (%)

Figure 4.33 Major Models Share of PSA's EMPII Platform 2023 (%)

Figure 4.34 Major Models on PSA's EMPII Platform 2013-2023 (Unit Sales (000s))

Figure 4.35 BMW's UKL Platform Sales Forecast 2013-2023 (Units 000s, AGR %)

Figure 4.36 BMW's UKL Platform Market Share Forecast 2013-2023 (% Share)

Figure 4.37 Major Models Share of PSA's EMPII Platform 2018 (%)

Figure 4.38 Major Models Share of PSA's EMPII Platform 2023 (%)

Figure 4.39 Major Models on BMW's UKL Platform 2013-2023 (Unit Sales (000s))

Figure 4.40 Volvo's SPA Platform Sales Forecast 2013-2023 (Units 000s, AGR %)

Figure 4.41 Volvo's SPA Platform Global Platform Market Share Forecast 2013-2023 (% Share)

Figure 4.42 Major Models Share of Volvo's SPA Platform 2018 (%)

Figure 4.43 Major Models Share of Volvo's SPA Platform 2023 (%)

Figure 4.44 Major Models on Volvo's SPA Platform 2013-2023 (Unit Sales (000s))

COMPANIES LISTED

Aston Martin

Avtovaz

Beijing Automotive

BMW

Brilliance

BYD Auto Co Ltd.
Chang'an Automobile
Chery
Chrysler
Daimler AG
Dongfeng Motor Corporation
FAW Group
Fiat
Ford
Fuji (Subaru)
GAC Group
Geely
General Motors (GM)
Great Wall
Hafei Motor
Hawtai
Honda
Hyundai-Kia
Isuzu
JAC Motors
Jaguar-Land Rover
Lotus Cars
Mahindra
Maruti Suzuki
Mazda
McLaren
Mitsubishi
Porsche
PSA Peugeot-Citroen
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Volkswagen Audi Group (VAG)
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