
(Sample)

Huidian Research

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5. Analysis and Forecast of Market Supply and Demand

5.1 Supply Analysis

5.1.1 China’s Car Output, 2008-2012

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5.1.2 Structure of Automatic Transmission Product Market

Fig. 6 Structure of Car Automatic Transmission Product Market

According to the statistics of China Association of Automobile Manufacturers, in 2012, China’s passenger car sales volume was 15.5237 million units, of which, the sales volume of MT type was 9.64 million units; and the volume of AT type was 4.94 million units. Therefore, the development prospect of automatic transmission is broad and the market is huge. This situation is both opportunity and challenge for domestic enterprises which engage in the self-development of automatic transmissions.

Source: Huidian Research
5.1.3 Structure of Automatic Transmission Brand Market

The technological research and production of automatic transmissions is monopolized by foreign enterprises due to the complex structure, high R&D costs and difficult parts processing; domestic products are mainly based on manual transmissions with low speed, and the production capacity of automatic transmissions is very weak; the automatic transmissions are mainly produced by foreign-funded or foreign-controlled enterprises, and most of the products are rely on imports.

In current domestic transmission market, the joint venture brands are the main force, accounting for 45%; followed by foreign brands with the proportion of 32%; and the market share of domestic brands is only 23%. In this field, the imports increase continuously, and the import amount has reached USD 6.44 billion in 2012 from USD 480 million in 2001.

5.1.4 Supply Volume, 2008-2012

According to the statistics, the proportion of MT (manual transmission) type and AT (automatic transmission) type is 6:4 in current passenger cars in China.; of which, 89% of the high-end passenger cars are equipped with automatic transmission, and this proportion for medium-end passenger cars and economic-type household passenger cars is 40% and 10% respectively. The sales volume of domestic automatic transmissions is much lower than the sales of automatic transmissions with joint venture brands; about 80% of domestic AT passenger cars are equipped with joint venture brands' automatic transmissions, and local brands only account for 20%. Currently, accelerating the R&D and industrialization process of China’s car automatic transmission industry has become a key point to change the imported products-dominated situation, as well as an urgent task for China's automobile industry.
In 2012, the supply volume of China's car automatic transmission was 6.2095 million units, increased by 7.16% over 2011. From 2008-2011, the supply volume of this market showed a rapid growth trend; whereas, the growth rate started to slow down in 2012.

**Fig. 8 Supply Volume of China's Car Automatic Transmission Market, 2008-2012**

![Graph showing supply volume of China's car automatic transmission market from 2008 to 2012.](source: Huidian Research)

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