
Description: This report provides a detailed analysis of 25 key suppliers of components to global medium- and heavy-duty truck manufacturers.

Component markets are split into the following segments:

- Engine
- Transmission
- HVAC
- Body/Chassis
- Interior Design
- Suspension
- Electronics
- Battery
- Other

Topics include global, regional and major country production volumes and values, prices, market shares, the competitive environment, and mid- and long-range forecasts. In addition, there are in-depth discussions of issues facing the industry, such as profitability and growth strategies, product mixes, new technologies, aftermarket services, service revenues, and current and emerging markets.

Components equaled 49% of the estimated USD113.19 billion 2014 global medium- and heavy-duty truck production costs. Total demand for components is forecast to grow at a 9.5% compounded annual growth rate during the next five years, faster than the growth rate for truck production itself. This will potentially reduce operating margins and force truck manufacturers to either increase prices, increase productivity or lower non-component costs.

The NAFTA region is the largest market for components, accounting for 47.9% of total demand in 2014. The Asia-Pacific region, which in 2014 accounted for less than half of NAFTA demand, will be the fastest growing region during the next five years, due to increasing economic growth in the region and the increase in urbanization and related transportation requirements.

Advanced vehicle technologies such as high efficiency powertrains, Advanced Driver Assistance Systems, LED lighting, electronic control units, etc., were first adopted for use in automobiles and are now increasingly used in medium- and heavy-duty trucks; therefore these topics are included for discussion in this report.

The fastest growth will be in electronics, which are estimated to comprise 6% of the components market in 2014. By 2019, electronics are forecast to equal 8%, equivalent to a 16% CAGR. Advances in automotive electronic technologies add value in areas such as environment, safety/security, and comfort/convenience.

In response to tighter regulations world-wide for items such as powertrains and driver safety controls, further advances in the complexity and precision of electronic control systems, and installation of more units of electronic devices such as ECUs, sensors, actuators and connectors, are expected. Along with this will come a faster pace of advances in software to control these devices. There will also be a need for more powerful and more expensive batteries, resulting in a significant growth in battery demand between 2014 and 2019.

As car and truck makers grapple with a wide range of technological development needs, including emission controls and meeting fuel efficiency standards, R&D expenditures are ballooning. As a result, in addition to making alliances with other finished vehicle makers, OEMs are likely to outsource more development to the parts makers. The result will be a structure in which finished vehicle manufacturers concentrate their management resources on developing platforms, marketing, and drawing up brand strategies.

Contents: 1. Preface
2. Executive Summary

3. Introduction
   - Report Objective
   - Scope of Coverage
   - Advanced Vehicle Technologies
   - Statistical Notes

4. Medium/Heavy-Duty Truck Components Market
   - Medium- and Heavy-Duty Truck Market
   - Components Definitions
   - Derivation of Components Market Size
   - Components Market by Part Category
   - Component Market Growth by Part Category
   - Electronic Parts Growing Fastest
   - Components Market Growth by Type and Region
   - NAFTA Components Market
   - NAFTA Class 8 Engine Shipments
   - NAFTA Class 8 Transmission Shipments
   - Europe Components Market
   - Asia-Pacific Components Market
   - Rest of World Components Market

5. High Efficiency Powertrain
   - Powertrain and Fuel Efficiency
   - Fuel Economy Standards Have Tightened
   - Mediumand Heavy-Duty Truck Fuel Efficiency Standards
   - Europe Also Tightening Standards
   - High Efficiency Powertrain
   - Traditional Powertrain Inefficient
   - HEP Technologies
   - Engine-Enhancing Technologies: Air Management, Turbocharging
   - Turbocharger Suppliers
   - Variable Valve Actuation
   - Variable Valve Suppliers
   - Cooled Exhaust Gas Recirculation
   - Fuel Management: Direct Injection Systems
   - Direct Injection Suppliers
   - Other Engine-Enhancing Technologies: Engine Machined Parts and Sealing
   - Transmission-Enhancing Technologies
   - Dual Clutch Transmissions
   - DCT Transmission Suppliers
   - 6-8 Speed Transmissions
   - 6-8 Speed Transmission Suppliers
   - Automated Manual Transmissions
   - Automated Manual Transmission Suppliers
   - Secondary Axle Disconnect
   - Secondary Axle Disconnect Suppliers
   - Powertrain Electronics
   - Start-Stop Systems
   - Start-Stop System Suppliers
   - Double-Digit Growth for HEP
   - Suppliers That Will Most Benefit from HEP
   - Advanced Technologies Support Market Concentration

6. Electronics Transform The Supply Chain
   - High Growth for Device Volume
   - Drivers of Electronification
   - Electrification to Produce Changes in Components Industry Structure
   - Shift From a Pyramid to a Diamond Structure
   - More Outsourcing of Parts
   - Birth of Tier-0 Suppliers
- Europe Leads in Standardization
- Emergence of Super Tier-2 Suppliers
- Moves Toward Standardization in Semiconductors
- Added-Value Outflow from Conventional Parts Makers
- Tier-1 Suppliers at a Crossroads
- Tier-2 Suppliers Face Price Pressures
- Vehicles an Attractive New Market to Electronics Companies

7. Company Profiles
- Alcoa Inc.
- Allison Transmission Holdings, Inc.
- Autoliv, Inc.
- BorgWarner Inc.
- Bosch Ltd
- Brembo S.p.A.
- China Zenix Auto International Limited
- Clarion Co., Ltd.
- Commercial Vehicle Group, Inc.
- Continental Aktiengesellschaft
- Cummins Inc.
- Dana Holding Corporation
- Delphi Automotive Plc
- Denso Corporation
- Eaton Corporation
- GS Yuasa Corporation
- Haldex
- Hella KGaA Hueck & Co.
- Koito Mfg.
- Meritor, Inc.
- Mobileye N.V
- Modine Manufacturing Company
- Panasonic Corp
- WABCO Holdings Inc.
- Weichai Power Co., Ltd.

8. Note On Methodology

List of Figures:
1. NAFTA Class 8 Monthly Engine Shipments Market Share by Producer (%): 2006-2014
2. NAFTA Class 8 Transmission Shipments by Type (AMT, Automatic, Hybrid, Manual [Units, %]): 1995-2015
3. Schematic Representation of the High Efficiency Powertrain
4. Exhaust Driven Turbine Turbocharger
5. Solenoid Controlled Fuel Injector
6. Piezo-Electric Fuel Injector
7. Continental System for Piezo Stratified Turbo Direct Injection Engines
8. 4-Cylinder GDi Turbo Gasoline Engine Components
9. Revenue Generated from Engine Technology by Supplier (USD Million): 2013
10. Revenue Generated from Engine Technology by Supplier as Percent of Total Revenue: 2013
13. Growing Use of Electronics in Vehicles
17. New Categories of Vehicle Parts Suppliers: Tier-0 and Super Tier-2
18. Future Vision of the Structure of the Parts Supplier Industry
19. Integration of the ECUs: Control by Function and Control by Domain
22. Allison Transmission Revenue by Geography (%): 2013
23. Allison Transmission Revenue by Major End-Market (%): 2013
24. Allison Transmission Revenue by Class/Type (%): 2013
26. Improving Fuel Economy in Allison Automatic Transmissions by Source
27. Miles Per Gallon TC10 Test by Application
28. NAFTA Class 8 Transmission Shipments by Type (Units): 1995-2015
30. Allison Transmission Value Proposition Diagram
31. Allison Transmission Annual Revenue Change by Region (%): 2009-2013
32. Average Retail Price for Three-Year-Old Sleepers (Adjusted for Mileage): 2013
33. Allison Transmission Sales Breakdown by End-Market: 2013
35. Active Safety and Safety Telematics Functions
37. Autoliv Active Safety Revenue (USD Million): 2014-2020
39. BorgWarner: Last Decade vs. Next Decade
41. CAGR Growth Rates for Drivetrain End Markets by Type: 2014-2019
43. Bosch Ltd. Manufacturing Facilities
44. Bosch Group Product Verticals
45. Bosch Group's Organizational Structure in India
46. Clarion In-Vehicle Equipment Revenue by Product Group (%): 2014
49. Car-Mounted Cameras and Image Recognition Systems
50. Hitachi Group: ADAS (Advanced Driver Assistance System) Cooperation
51. Commercial Vehicle Group Revenues by Product Type (%): 2013
52. Commercial Vehicle Group Revenues by End Market (%): 2013
53. Commercial Vehicle Group Revenues by Customer (%): 2013
54. Continental AG Revenue by Segment (%): 2013
56. Components of A V2V System
58. V2V To Be Complementary To Other ADAS Sensor Technology
60. Car Instrument Clusters Market Shares by Company (%): 2013
61. Car Cockpit Electronics Market Shares by Company (%): 2013
62. Car In-Vehicle Infotainment Market Shares by Company (%): 2013
64. Cummins Engine Sales by Application (%): 2Q 2014
65. Class 8 Truck Shipments from US, Canada and Mexico Plants by Type (Units): 2006-2014 . 144
68. Class 8 Group 1 Engine (<10L) Market Share Trend Analysis (By Manufacturer): 2006-2014
69. Navistar Class 8 Truck Engine Mix (By Manufacturer): 2007-2014
70. Cummins Group 2 Class 8 Truck Customer Mix (%): 2007-2014
71. Cummins Engine Unit Shipments by Type (Y-o-Y Growth): 2003-2014
72. Cummins Midrange Engine Unit Shipments (Number): 2003-2014
73. Cummins High Horsepower Engine Unit Shipments (Number): 2003-2014
74. Cummins Heavy-Duty Engine Unit Shipments (Number): 2003-2014
75. Class 8 Engine Y-o-Y Unit Growth for Cummins vs. Industry (%): 2010-2014
76. Cummins North America Class 7 Truck Engine Monthly Market Share (%): 2010-2014
77. Delphi Revenue by Segment (%): 2014
78. Delphi Revenue by End Market (%): 2014
81. Delphi Electrical/Electronic Architecture Products
82. Delphi Powertrain Systems Products
83. Delphi Electronics & Safety Products
84. Delphi Thermal Systems Products
86. Delphi Geographic Diversification (%): 2013
87. Delphi Revenue by Customer (%): 2013
88. US Safety Technology Penetration Rates by Type: 2013
89. US Navigation Penetration Rates: 2002-2018
151. Panasonic’s Automotive Display Suppliers by Market Share (%): 2014
152. Automotive Display Suppliers by Market Share (%): 2014
153. Examples of Stereo Camera Uses
154. WABCO Products and Share of Revenue (%): 2013
155. WABCO Revenue by End Market: 2013
156. WABCO Revenue by Geography (%): 2013
157. WABCO Addressable vs. Total Available Market Content Per Vehicle by Region (USD): 2014
158. Global Truck Production by Region (%): 2014
159. WABCO Aftermarket Revenue (USD Million): 2005-2013
160. WABCO Aftermarket Revenue Growth (%): 2005-2013
161. WABCO European Revenues (USD Million): 2005-2013
162. WABCO Asian Revenues (USD Million): 2005-2013
164. WABCO South American Revenues (USD Million): 2005-2013
165. WABCO vs. Major Competitors Revenues (USD Million): 2013
166. China Heavy-Duty Truck Engine Company Market Shares (%): 2012

List of Tables:
5. Medium- and Heavy-Duty OEM Trucks Components Market by Part and Region (USD Billion): 2014
6. Medium- and Heavy-Duty OEM Trucks Components Market by Part and Region (USD Billion): 2019
11. Powertrain Adoption by Type and Region and CAGR (Thousand Units, %) 2012 – 2021
12. High Efficiency Powertrain Technology Exposures by Supplier
13. Engine Technologies Supplier Exposures by Product
14. Machined Parts and Sealing Supplier Exposures by Product
15. Transmission Technologies Supplier Exposures by Product
16. Start-Stop Supplier Exposures
17. Powertrain Electronics Supplier Exposures
18. Automotive Electrical Systems by Class, Type and Function
19. Automotive Electrical System Markets by Class, Type, Volume (Million Units), Value (JPY Billion), Growth (%), and Penetration Rate (%): 2014-2020
20. Structural Parts and Materials Used in Electronic Devices and ECUs by Type and Function
22. HEV/EV Related Parts and Materials
26. Automotive Electronics System and ECU Key Players by Category and Market Shares (%): 2014
27. Automotive Sensors, Devices, ECU Materials and HEV/PHEV/EV Materials Key Players By Category, Type and Market Shares (%): 2014
29. Subcommittee Categories in the ISO’s Technical Committee 22 (22nd Technical Committee, Automotive Field)
31. Alcoa Engineered Products and Solutions Revenue, EBITDA, Operating Margins, ATOI (USD Million, %): 2006-2017
33. Allison Transmission Operating Matrix
34. Allison Transmission Revenue and Growth Rate by Segment: 2012-2016
97. Camera-Based ADAS Penetration Rate and Growth Rate by Region (Million Units, %): 2014-2020
98. Mobileye Market Share, ASP and OEM ADAS Revenue (USD Million, %): 2014-2020
99. Mobileye Autonomous Driving Opportunity and Total OEM Revenue (Millions, %): 2014-2020
100. Sensors Categorized by ADAS Technology
101. ADAS Feature Comparison by Technology
102. ADAS Competitive Landscape by Company and Technology
103. Mobileye Tier 1 Competitors
106. Panasonic Lithium-ion Battery OEM Customers
107. Panasonic Nickel-Metal Hydride Battery OEM Customers
109. WABCO Demand Drivers by Product Segment
110. WABCO Non-European Revenue and Earnings Under Different Content Scenarios (USD Million): 2013
111. WABCO Income Statement (USD Million): 2012-2016
112. Major Heavy-Duty Truck Engine Producers in China and Their Customers: 2014
113. Major Heavy-Duty Truck Producers' Engine Procurement Practices Including Outsourcing, Foreign Partners, In-house Units, Capacity, Major Customers
114. Weichai Power's Heavy-Duty Truck Engine Sales by Major Customers (HDT Units, Market Share, Procurement Ratio, Weichai Units): 2012
115. Weichai Power's Long-Term Competitive Position by Customer (Unit Sales, Procurement Share, Market Share): 2012
116. China Commercial Vehicle Sales (Million Units) and Growth Rate (%) by Type (Medium/Heavy-Duty Trucks, Light Trucks, Mini-Trucks, Buses): 2011-2016

Ordering:
- Order by Fax - using the form below
- Order by Post - print the order form below and send to

  Research and Markets,
  Guinness Centre,
  Taylors Lane,
  Dublin 8,
  Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

Web Address: http://www.researchandmarkets.com/reports/3146049/
Office Code: SCPLEY4W

Product Formats
Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
</tr>
<tr>
<td>Single User:</td>
<td>USD 1950</td>
</tr>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
</tr>
<tr>
<td>Site License:</td>
<td>USD 3900</td>
</tr>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
</tr>
<tr>
<td>Enterprisewide:</td>
<td>USD 5850</td>
</tr>
</tbody>
</table>

Contact Information
Please enter all the information below in BLOCK CAPITALS

Title: [ ] Mr [ ] Mrs [ ] Dr [ ] Miss [ ] Ms [ ] Prof
First Name: __________________________________________ Last Name: __________________________________________
Email Address: * ______________________________________
Job Title: ____________________________________________
Organisation: _________________________________________
Address: _____________________________________________
City: _________________________________________________
Postal / Zip Code: ____________________________________
Country: _____________________________________________
Phone Number: ________________________________________
Fax Number: __________________________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer:

Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: _______________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:

(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World