

### What Does A Transmission Do?

- · A transmission adapts the output of the internal combustion engine to the drive
  - Important element in the "feel" of driving for consumers
- Power Transmission Fluids (PTF) relate to fluids necessary for proper operation of automatic transmissions including: stepped automatic transmissions, dual clutch transmission, continuously variable transmission, etc.
- Automatic Transmission Fluids (ATF), generally, relate specifically to fluids for stepped automatic transmissions



Performance you can rely on.

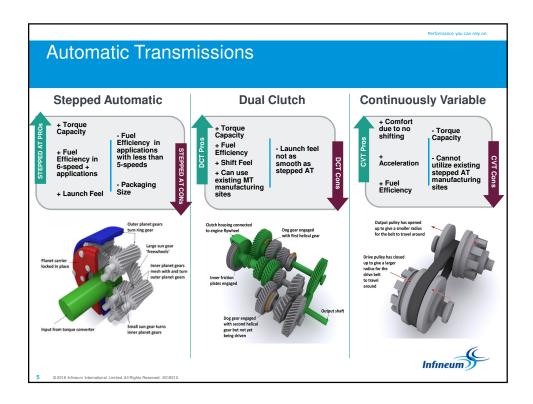
## Types of Transmissions

- Stepped Automatic Transmission (AT)
  - Most common automatic transmission that uses a planetary gear set and a torque converter
- Continuously Variable Transmission (CVT)
  - Automatic transmissions that use variator pulleys with an unlimited number gear ratios
- Dual Clutch Transmission (DCT)
  - Automatic transmissions that use manual gearbox architecture with dual clutches
- Automated Manual Transmission (AMT)
  - Manual transmissions that use servos to engage clutch and change gears automatically
- Electrical Variable Transmission (EVT)
  - Combines stepped automatic transmission with electric motor (e.g. Toyota's Hybrid Synergy Drive)
- Reduction Transmission (Electric)
  - Transmissions used by purely electric vehicles to reduce torque output from electric motors (Nissan Leaf)
- Manual Transmission (MT)









### **Transmission Trend Drivers**

Fuel Economy And Emissions

- Development of CVT, DCT and Higher Gear Ratio spreads
- Improvement of friction clutch, pump, seal efficiencies
- Hybrid / Electrification
- · Low viscosity fluids

### **Driving Performance**

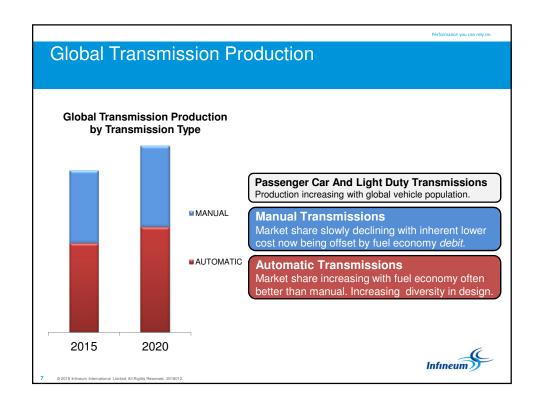
- Shift Quality / Noise-Vibration-Harshness (NVH) /Comfort
- Safety/Fun-to-Drive sporty dynamic driving style adapts to suit your individual driving style

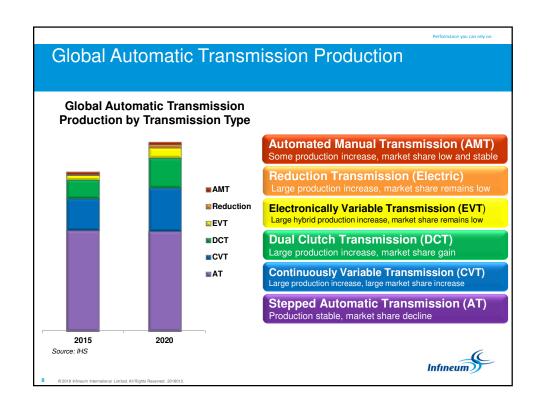
### Compact Size And Reduced Weight

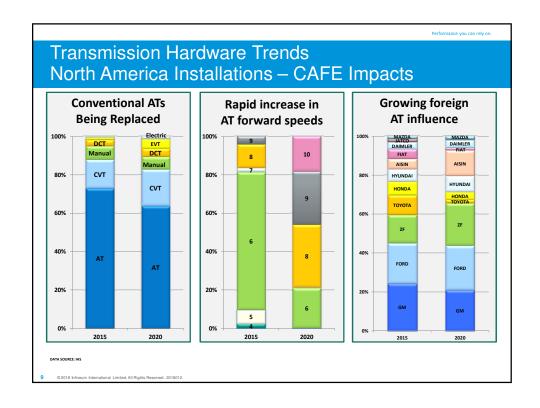
- Smaller Transmissions Less fluid
- Increased Torque Density

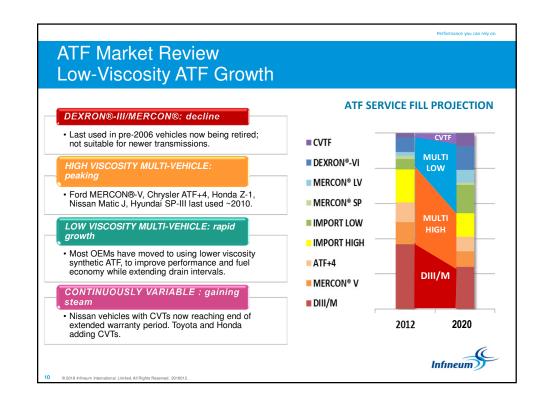


Performance you can rely on.





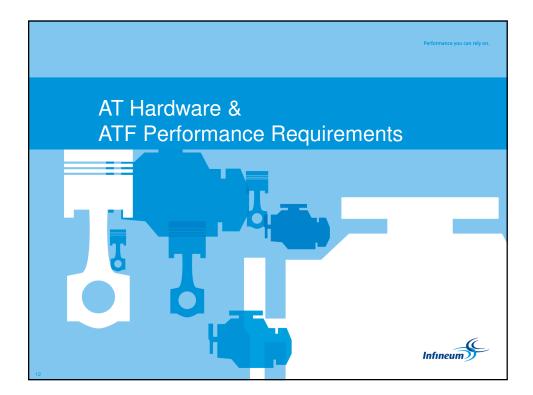


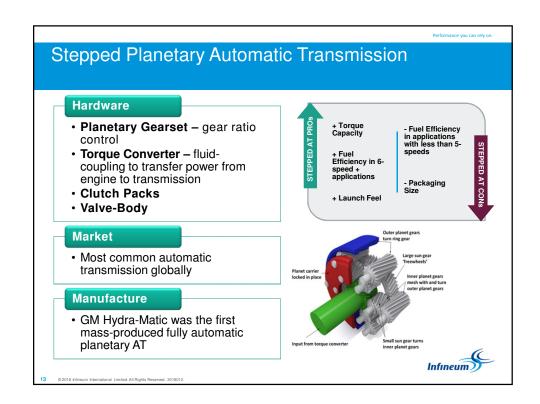


## **Market Summary**

- Market Trends
  - Automatics are gaining market share globally
  - Manual transmission production is lower than automatics
- Stepped Automatics (AT) are still the majority for automatics
  - ATs are gaining more gears most will be 8, 9 and 10-speeds
  - Major manufacturers are Ford, GM and ZF
- · CVT and DCT are taking market share away from AT
- Automatic transmission fluids are shifting to lower viscosity to aid in fuel economy
- · More Universal ATF products are making their way into the marketplace

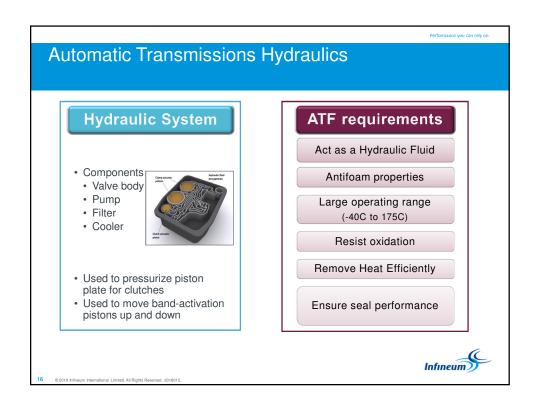


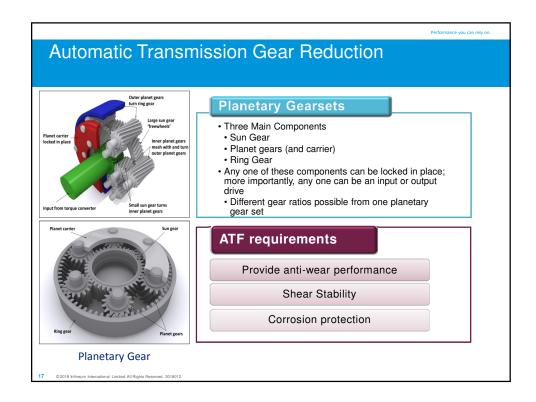


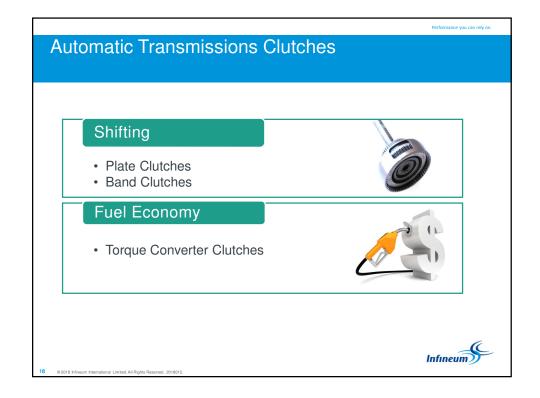


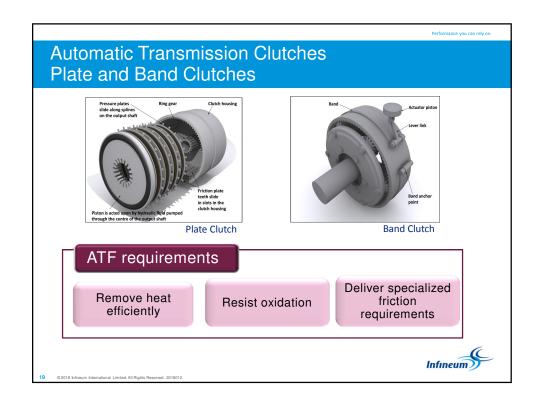


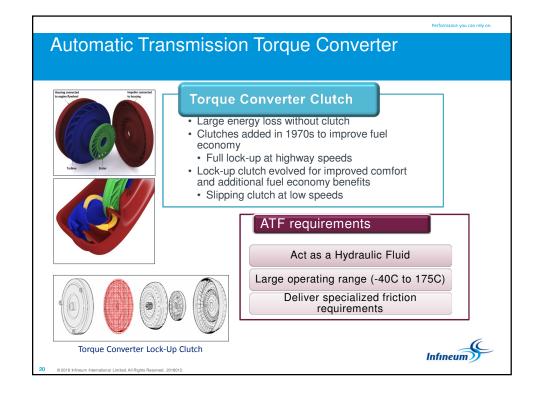


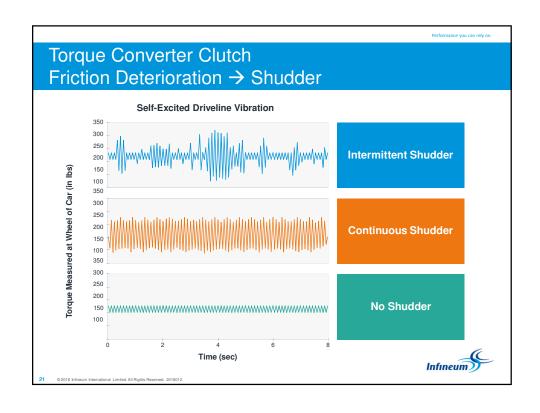


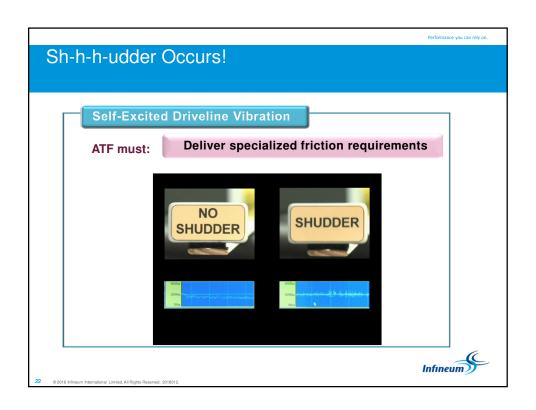


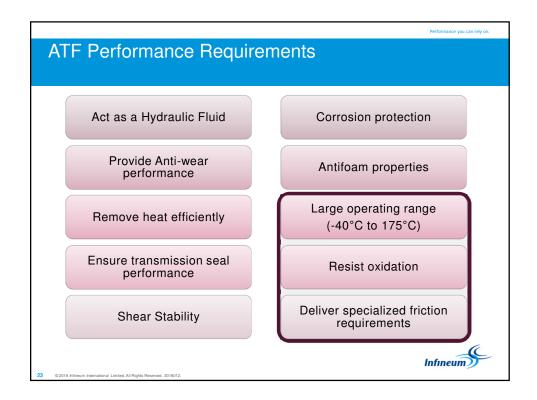












## Stepped Automatic Transmission Summary

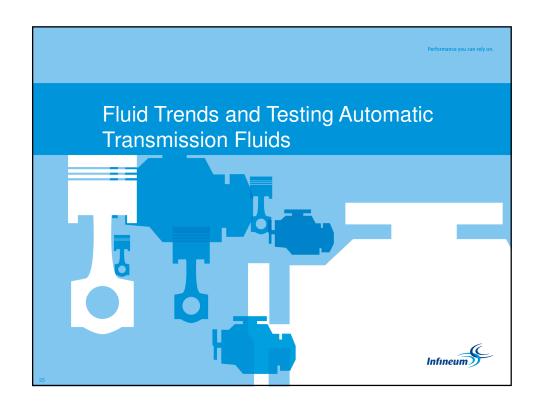
#### The automatic transmission has 4 major components:

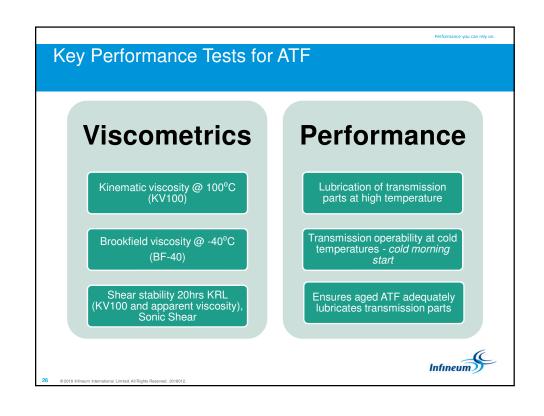
- 1. Torque Converter transfer power from engine to transmission
- 2. Planetary Gear Set changes output speed
- 3. Valve Body the "brain" of the transmission
- 4. Clutches (plate or band) changes gear ratios

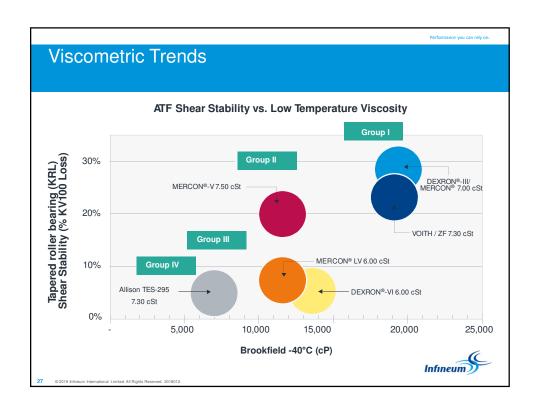
### The fluid needs to do the following:

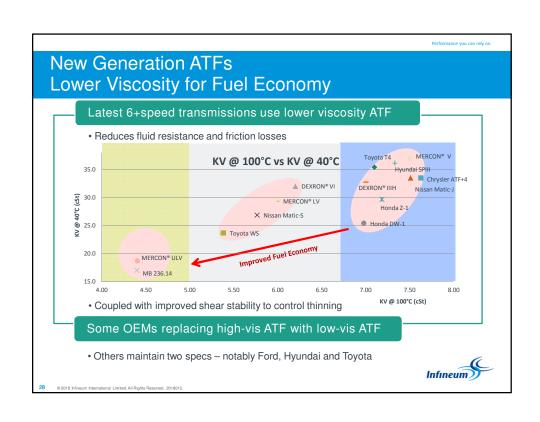
- 1. Act as a hydraulic fluid
- 2. Protect the Gear Set (Anti-Wear)
- 3. Remove heat efficiently
- 4. Ensure seal performance
- 5. Resist oxidation
- 6. Protect against corrosion
- 7. Deliver specialized Friction Characteristics

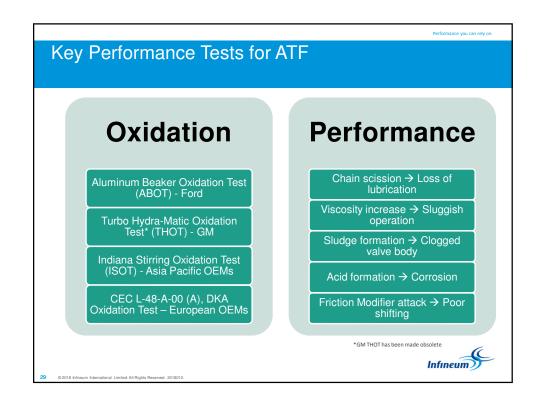
Infineum

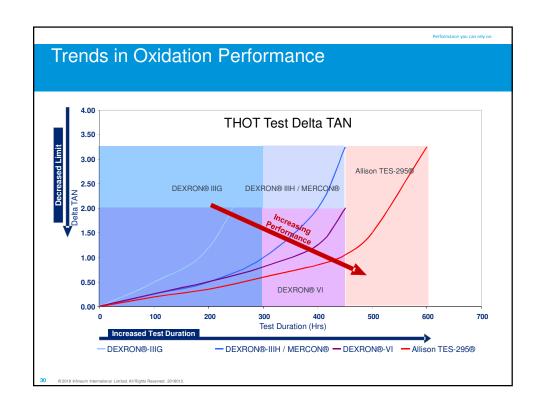




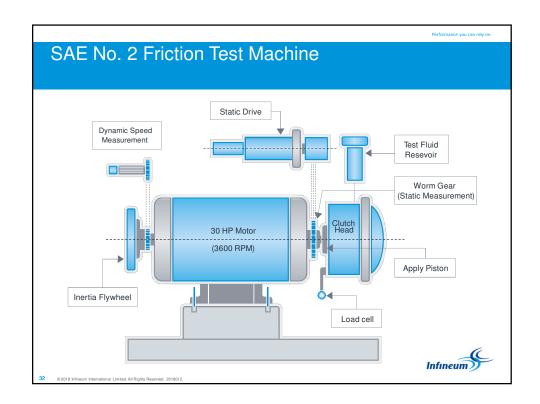


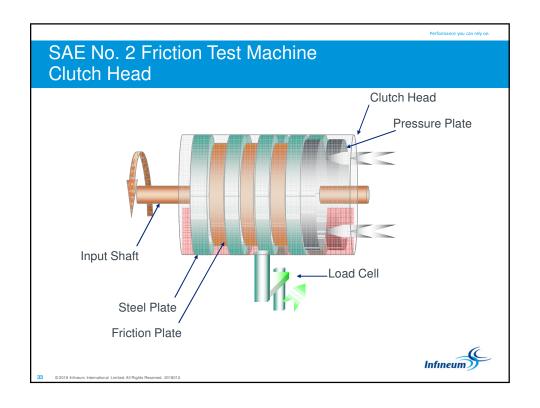


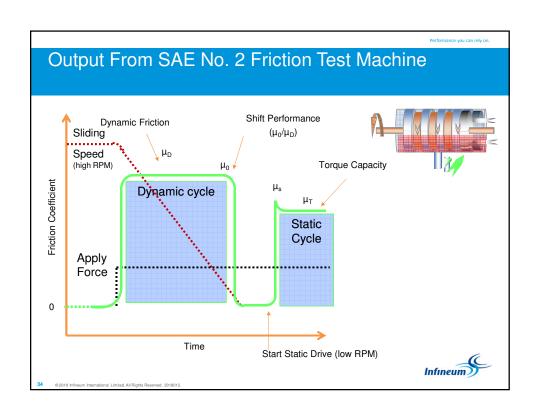


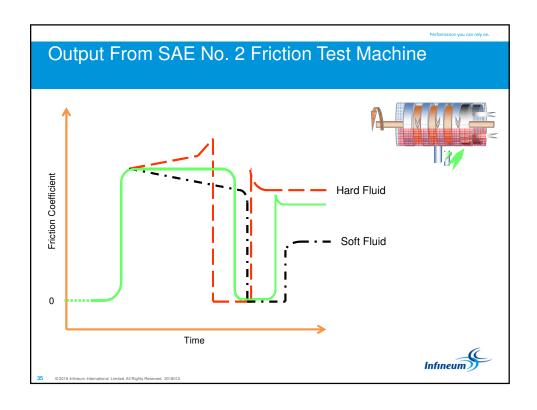


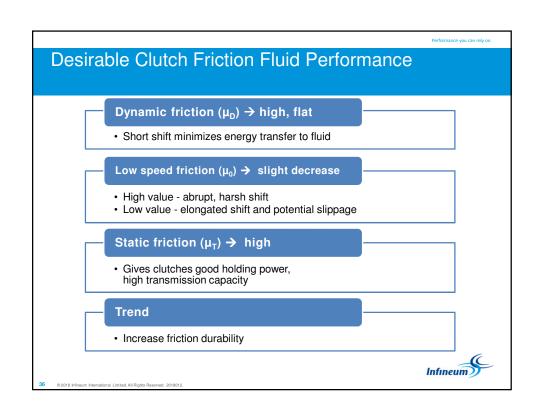
Key Performance Tests for ATF Clutch **Performance Friction** Shifting Clutch Shifting Clutch SAE#2 Friction and Anti-Shudder Durability (ASD) rig – US and Asia Pacific OEMs · Abrupt, harsh shift • Elongated shift and potential Band Friction test – GM
Plate Friction test – GM and Ford Gives clutches good holding power, high transmission capacity Cycling test – GM Torque Converter Clutch Torque Converter Clutch Low Velocity Friction Apparatus (LVFA) for ASD – Asia Pacific OEMs Anti-Shudder durability Infineum

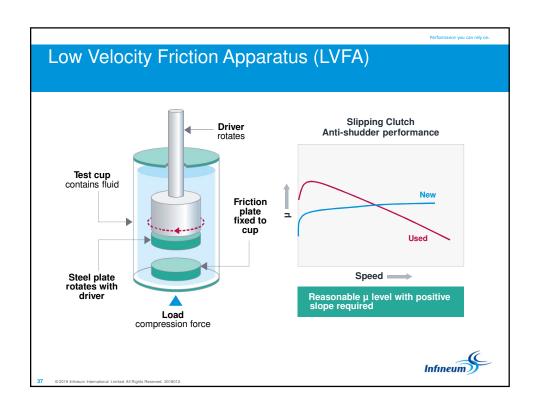


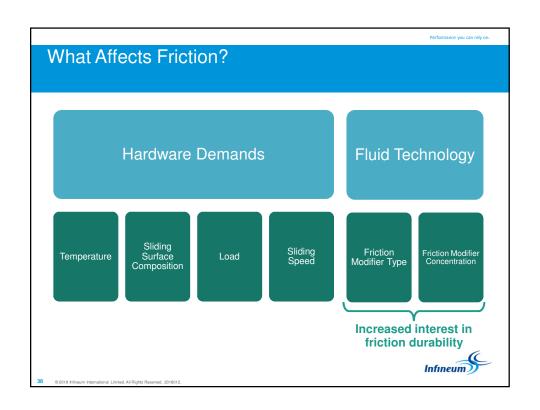












ATF Performance Summary

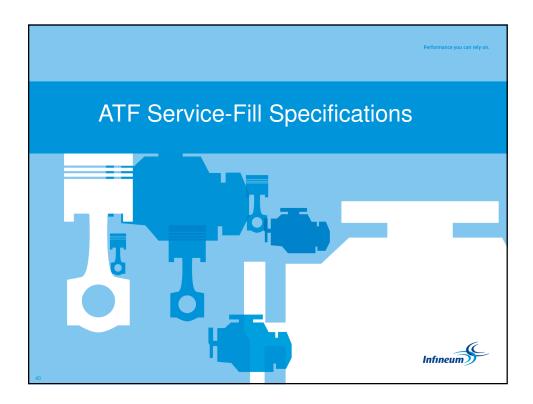
erformance you can rely on.

ATF must meet exacting requirements for a variety of parameters

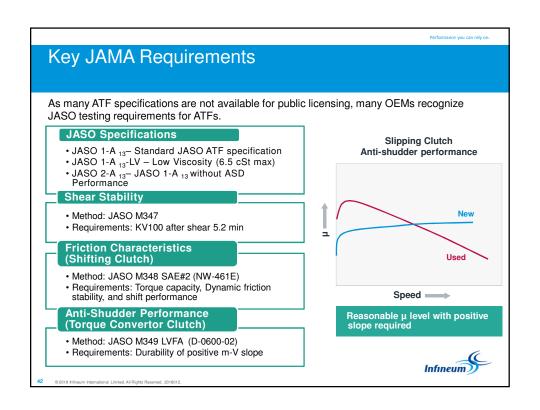
### **Key Performance Attributes**

- Viscometrics
- · Oxidation resistance
- · Friction stability and durability

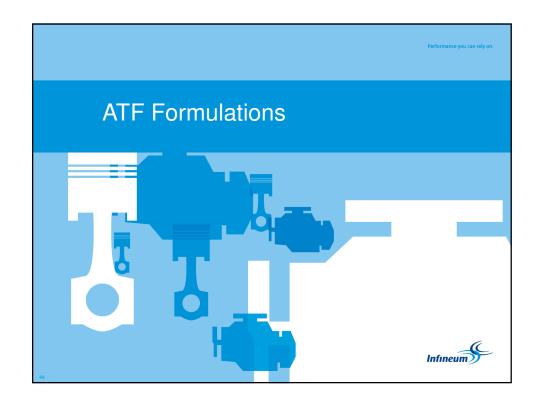
Infineum

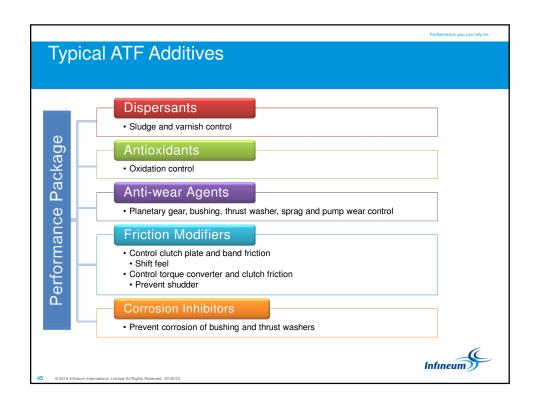


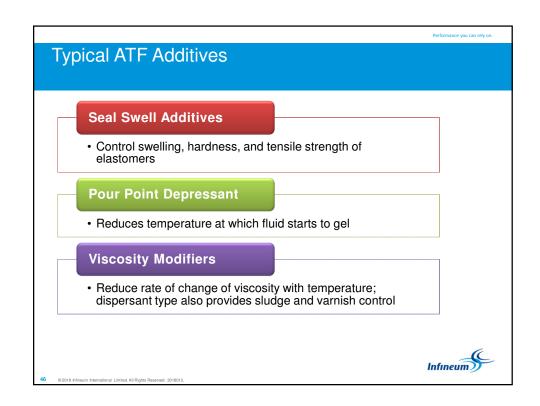
'asser	nger Car	ATF Specific	ations	
	OEM	High Viscosity	Low Viscosity	Ultra Low Viscosity
can	Ford	MERCON® MERCON® V	MERCON® LV	MERCON® ULV
North American OEMs	CHRYSLER	ATF +3 <sup>®</sup> ATF +4 <sup>®</sup>	948TE	-
No	<u>GM</u>	DEXRON® II DEXRON® III	DEXRON® VI DEXRON® HP	-
Mercedes-Benz		MB 236.10	MB 236.12	MB 236.14
Eurol		Lifeguard 5	Lifeguard 8	-
	<b>®</b>	Toyota T-IV	Toyota WS	-
Asia Pacific OEMs		Matic J/K	Matic S	-
sia Paci OEMs		Honda Z-1	Honda DW-1	-
¥	(P)	Hyundai SP-III	Hyundai SP-IV	-

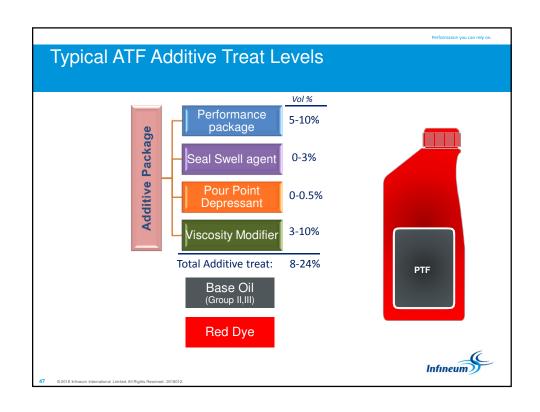


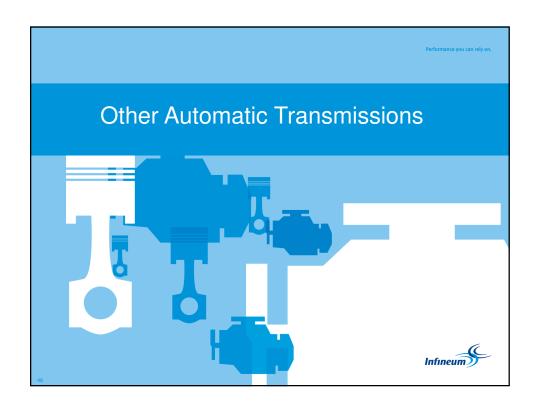
Heavy-c	duty ATF	Specification	IS	
OEM	Region /	Standard	Intermediate	Long / Extended
OLIVI	Type	Drain Interval	Drain Interval	Drain Interval
• • • • • • • • • • • • • • • • • • • •	1000/2000, 3000, and 4000 Series	Allison TES-389™	-	Allison TES-295® Allison TES-468™
Allison Transmission.	H 40 EP™ H 50 EP™	-	-	Allison TES-468™
	5000, 6000, 8000, and 9000 Series	Allison TES-439™	-	Allison TES-353™
VOITH	North America	Service Bulletin 13 & 118 Standard Drain (36K mi)	-	Service Bulletin 13 & 118 Long Drain (72K mi)
	Europe	G607 – H55.6335xx Standard - 60,000 km	-	G1363 – H55.6336xx Long - 120,000 km
	EcoMat	ZF TE-ML 14A 30,000 km	ZF TE-ML 14B 60,000 km	ZF TE-ML 14C 120,000 km
	EcoLife	ZF TE-ML 20B 60,000 km	-	ZF TE-ML 20C 120,000 km
MAN	All	339 Type V1/Z1	339 Type Z2/Z11	339 Type V2/Z3/Z12
VOLVO	All	STD 1273,40 – Trucks STD 1273,41 – VCE	-	STD 1273,42 – VCE
Mercedes-Benz All		MB 236.7 MB 236.9	-	-

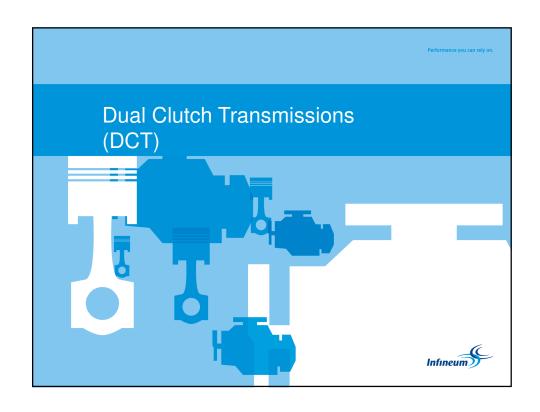


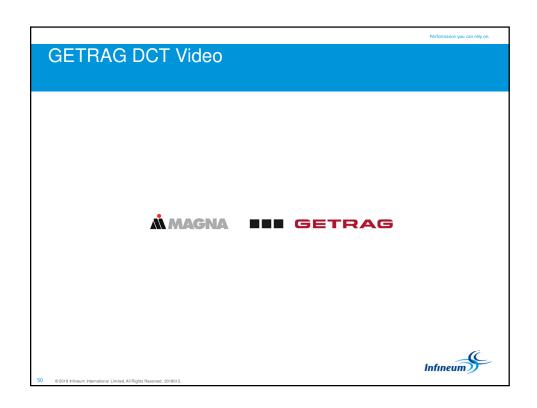


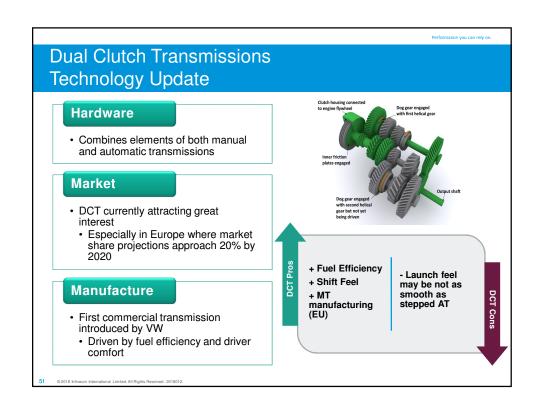


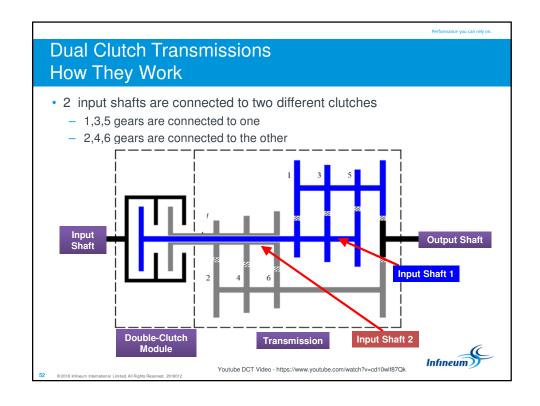






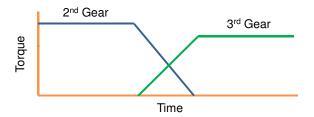




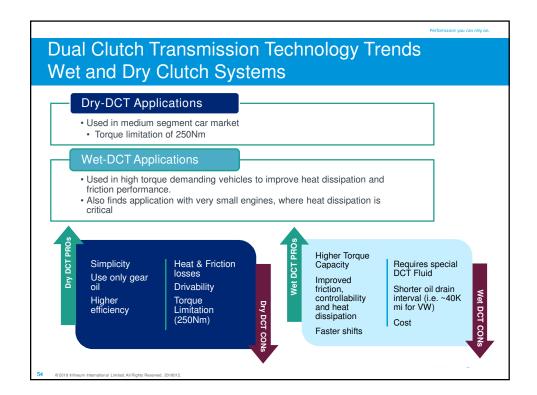


## Dual Clutch Transmissions How They Work

- Consecutive gears can be "synchronized," but only one gear is connected to engine via active clutch
  - e.g; While 2nd gear is synchronized and engaged, 3rd is "synchronized" and disengaged.
- To change from 2nd gear to 3rd gear, the secondary clutch opens (disengages) while the primary clutch closes (engages)
  - Shortest shift time of any production transmission type







## **DCT Fluid Requirements**

#### **Dry-DCT Fluid Requirements**

- Gear Pitting protection
- Friction and wear control for synchronizers
- · Corrosion resistance
- · Material compatibility
- · Oxidation control
- Manual Transmission Fluids can typically meet dry clutch DCT needs

### Wet-DCT Fluid Requirements

 Same as for Dry DCT, but adding / balancing Clutch Friction control and Anti-Shudder Durability



Performance you can rely on.

© 2018 Infineum International Limited. All Rights Reserved. 201801

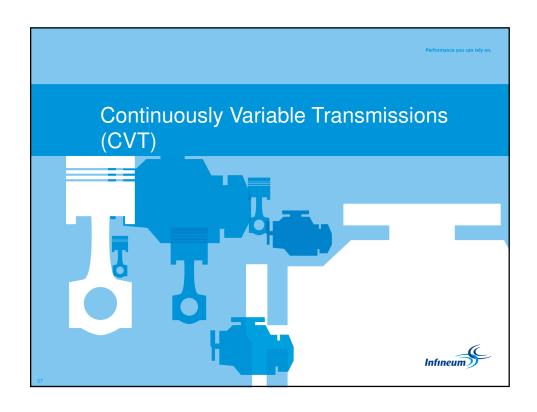
### **DCT Summary**

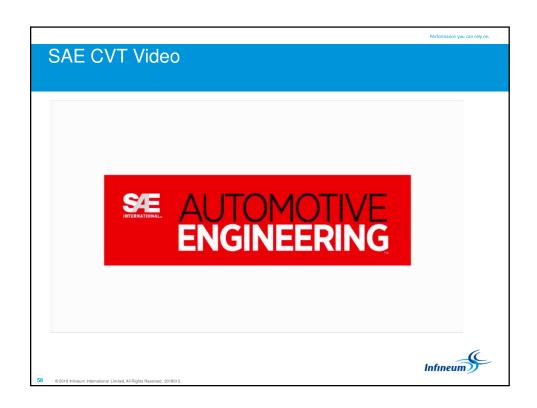
Dual Clutch Transmissions are essentially manual transmissions that can shift automatically

DCT Fluids need to have the following properties

- 1. Gear Pitting protection
- 2. Friction and wear control for synchronizers
- 3. Corrosion resistance
- 4. Material compatibility
- 5. Oxidation control
- 6. Adding / balancing Clutch Friction Control
- 7. Anti-Shudder Durability







# Continuously Variable Transmissions Hardware

### Variator

- Key component allowing continuous step-less change in gear ratio
  - Engine run at optimum efficiency
    - · Fuel economy and performance
- Smooth power delivery, no 'shift shock'
- Driving performance minimum power loss during ratio changes

### Types

- Steel belt push or pull belt types
- Toroidal traction drive
- Hydromechanical combination of hydraulic and mechanical

Engine Efficiency

Page 6

CVT

CVT

RPM

### **OEMS Using CVTs Today**

- Nissan
- Subaru
- Honda
- Toyota
- Audi
- Ford
- GM



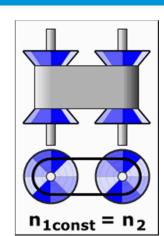
Performance you can rely on.

9 © 2018 Infineum International Limited. All Rights Reserved. 2018

# Continuously Variable Transmissions Variator System

## Metal 'V-belt' and Conical Pulley System

- Gear reduction ratio = Ro / Ri
  - Defined by radius of belt travel on pulley
- High clamping forces prevent belt from slipping
- Radius of belt travel controlled by width of pulley



#### Nissan CVT Video

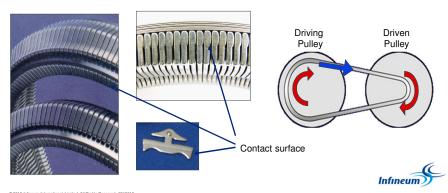
http://youtu.be/GLNqzn7WgDQ?t=31s

http://www.nissanusa.com/content/dam/nissan/vehicles/2013/pathfinder/colors-photos/videos/cvt.mp4



# Continuously Variable Transmissions VDT – Push Belt

- Developed by Van Doorne Transmissie (VDT)
- Push belt consists of ~300 steel blocks connected by flexible steel rings
- Force transmitted from pulley to pulley via compressional forces between belt elements



© 2018 Intineum International Limited. All Hights Heserved. 20180

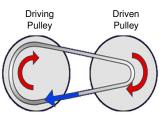
Performance you can rely on.

## Continuously Variable Transmissions LuK chain – Pull Belt

- · Chain links joined by rocker pins
  - Pulley clamping force acts on rocker pin ends
- · Force transmitted by tension on chain links

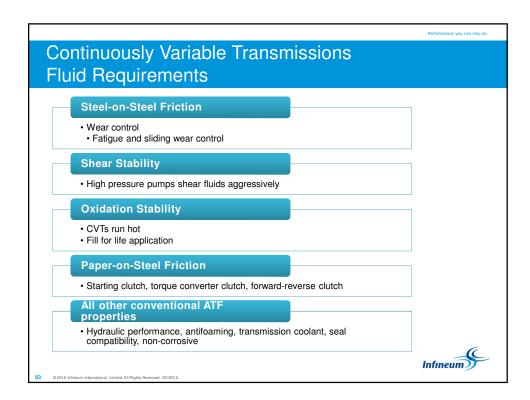






Subaru Chain CVT Transmission Video: http://www.subaru.com/engineering/transmission.html





CVT Fluid Technology Typical Properties – Commercially Available Fluids

Performance you can rely on.

- No public specifications exist for CVT Fluids
- Typical properties of commercially available CVT Fluids for VDT:

Properties	Typical Values		
Kinematic Viscosity at 100°C	~ 7.00 cSt		
Viscosity Index	~200		
Brookfield at -40°C	<9,000 cP		
Shear Stability	<10% shear Loss KV100		
Typical Elements	B, P, Ca (high level), some have Zn or Mg		
Cu Corrosion	1b		
Oxidation Stability	Exceed JASO 1A		
4 Ball Extreme Pressure	Welding Load ~160 kg; Load Wear Index ~30		
JASO Anti-Shudder Durability	Durability less than 100 hours		
JASO Clutch Friction M348	MuD Change: ~10%		
	Max. Mu0/MuD: 0.91 – 1.12		
	Min MuT: ~0.11		
Steel on Steel (SOS) Friction	0.11 - 0.13 for NS-2, TC, HCF-2, Audi CVTF, ZF CVTF		
	0.09 – 0.11 for HMMF		

## **CVT Summary**

- A CVT has few parts compared to other automatic transmission types
  - Uses two variator pulleys and a belt or chain instead of a planetary gear set
  - Has a continuum of gear ratios rather than discrete steps of ratio
- CVTs allow for a smoother power delivery
  - Power can be optimized for acceleration or fuel economy
- CVTs cannot handle higher torque applications
- CVT Fluid needs to do everything a normal ATF does, but with steel-on-steel friction performance as well



OEM Requirements	CVTF	DCTF	ATF
Steel on Steel Friction	<b>√</b>	×	×
Wear Protection	✓	✓	□/✓
Paper on Steel Friction	□/✓	✓	✓
Shear Stability	✓		
Oxidation	✓	✓	✓
Air-release	✓	✓	✓
Gear Protection		<b>√</b>	<b>✓</b>

Borformanco unu can rolu on

## Automatic Transmission Fluids Summary

### **Transmission Trends**

- Stepped planetary transmissions remain predominant
- · Increase in gear ratios to improve fuel economy
- · Reduced size and weight
- · Aggressive slipping clutch
- · Nonconventional transmissions gain market share
- CVT growth in Asia and North America
- DCT growth in Europe



© 2018 Infineum International Limited. All Rights Reserved. 201801

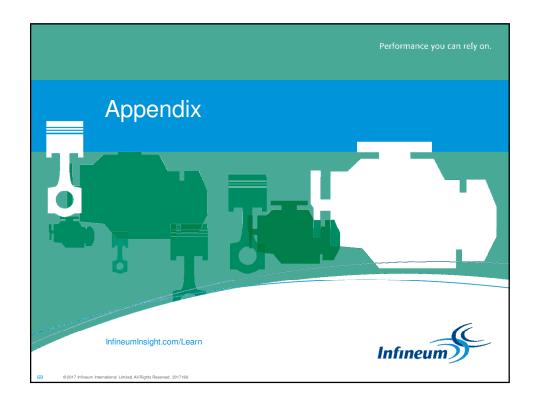
Performance you can rely on.

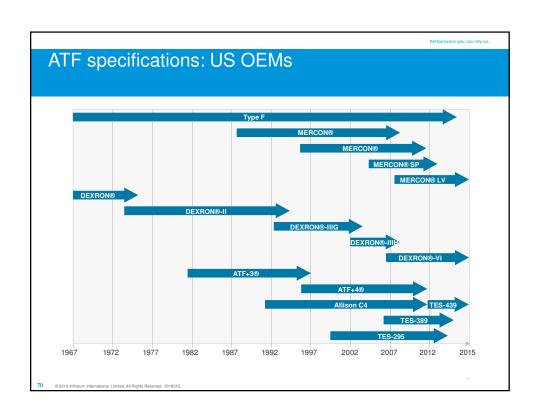
## **Automatic Transmission Fluids Summary**

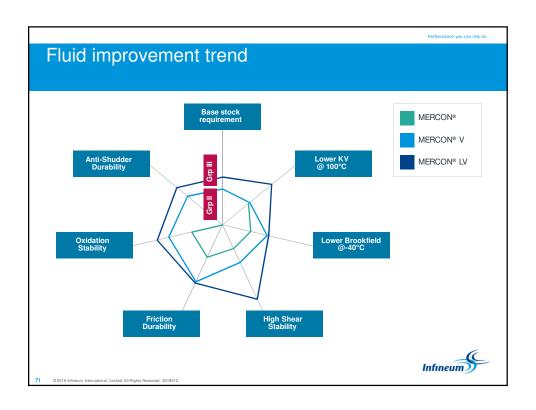
### Fluid Trends

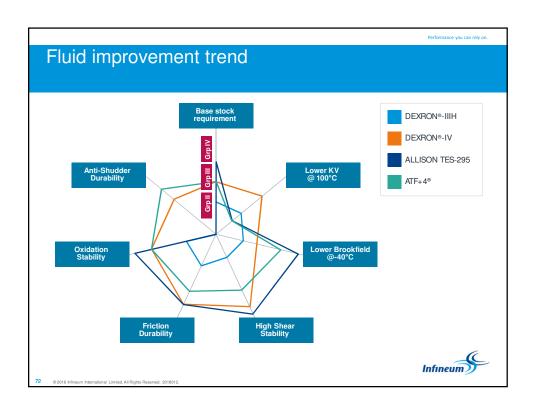
- OEMs specify ATF with:
- Exact friction requirements
  - Anti-shudder durability
  - Friction Durability
- Specific viscosity and shear stability requirements
- Better oxidation performance for longer drain intervals
- · Low Viscosity ATF becoming more predominant
  - · Improved fuel economy
- · Longer oil drain intervals
- Service-Fill market preference towards Multi-Vehicle ATF
- CVTs and DCTs require genuine OEM fluids







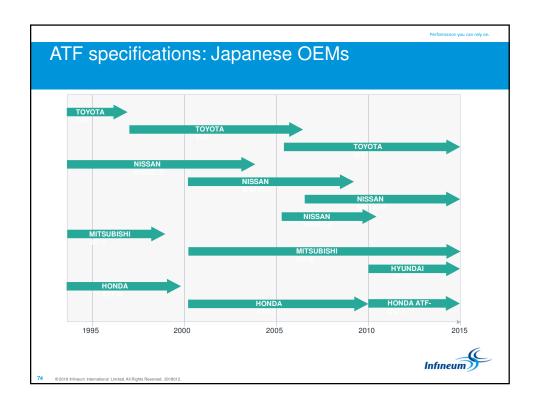




# ATF specifications – HD European OEMs

OEM	SPECIFICATION / OIL DRAIN INTERVAL
ZF TE-ML 14 – Ecomat (Trucks, Buses)	A. 30,000 km B. 60,000 km C. 120,000 km
ZF TE-ML 20 – EcoLife (Trucks, Buses)	B. 60,000 km C. 120,000 km
Voith (EU)	G607 – H55.6335xx: Standard - 60,000 km G1363 – H55.6336xx: Long - 120,000 km
Voith (NA)	Service Bulletin 13: Standard - 36,000 mi Service Bulletin 13: Long - 72,000 mi
MAN 339	Type V1/Z1: Standard Type Z2/Z11: Intermediate Type V2/Z3/Z12: Long
Mercedes Benz	Genuine Oil - MB 236.7, MB 236.9
Volvo	STD 1273,40 – Trucks – Standard Drain STD 1273,41 – VCE : 2000 hrs STD 1273,42 – VCE : 4000 hrs – Trucks – Extended Drain





## ATF specifications – Asia Pacific OEMs

- No OEM specifications available to public
  - Hardware designs and fluid requirements confidential
  - Common requirements can be seen through industry activities: JASO

OEM	JASO 1A	Minimum Performance
Toyota	Type T-III Type T-IV Type WS	Good ASD Long ASD Long ASD, Low Vis 6-spd
Nissan	MATIC D MATIC J MATIC K MATIC S	No ASD 4-spd Long ASD Long ASD FWD 5-spd Long ASD, Low Vis, RWD 5,7-spd
Honda	ATF-Z1 DW-1	AT High VI ATF
Hyundai / Kia	SP-III SP-IV	Long ASD Long ASD, Low Vis 6-spd



Performance you can rely on.

© 2018 Infineum International Limited. All Rights Reserved. 201801

## Key JAMA requirements

### **Shear Stability**

- Method: JASO M349-95 Sonic
- Requirements: KV100 after shear 5.7 minimum
- ~20% max vis. loss when fresh fluid KV100 is 7.1

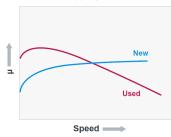
# Friction Characteristics (Shifting Clutch)

- Method: JASO M348-2002 SAE#2 (NW-461E)
- Requirements: Torque capacity, Dynamic friction stability, and shift performance

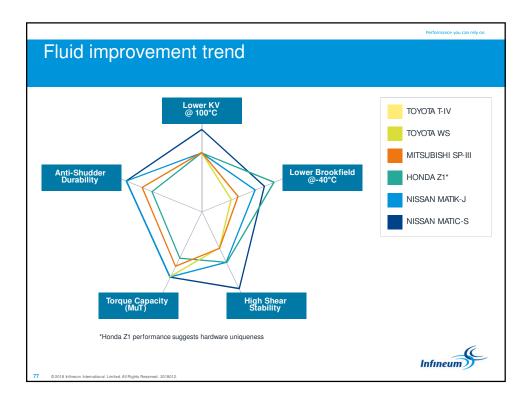
## **Anti-Shudder Performance** (Torque Convertor Clutch)

- Method: JASO M349-2001 LVFA (D-0512)
- Requirements: Durability of positive m-V slope

Anti-shudder performance slipping clutch



Infineum



### Oxidation test in ATF - ABOT

- Aluminum Beaker Oxidation Test (ABOT) is a bench test required for official Ford MERCON® and MERCON® V ATF qualification
  - Immersed in beaker circulates and shears test fluid
  - External heaters maintain fluid temperature of 155°C (311°F)
  - External air pumped into gear pump
  - Metal catalysts submerged in fluid to evaluate fluid's tendencies to attack metals, such as lead, copper, and aluminum.
  - Fluid samples drawn at intervals throughout test and at end of test, and analyzed for
    - Pentane insolubles, 300 hours max %
    - Differential IR carbonyl absorbance, 300 hours max per cm
    - Total acid number change, 300 hours max
    - · Viscosity change, 300 hours max %



## Oxidation test in ATF – THOT (or GMOT)

- Turbo Hydra-matic Oxidation Test is designed to evaluate an automatic transmission fluid's oxidation resistance, thermal stability and material compatibility characteristics; required for official GM DEXRON® ATF qualification
  - 7.5 kW electric motor and GM 4L60E Electronic Transmission
  - 450 hours steady state
  - Test fluid temperatures maintained at 163°C (325°F)
  - External air pumped into transmission
  - Fluid samples drawn at intervals throughout test and at end of test, and analyzed for
    - · Products of oxidation
    - TAN increase
    - Differential IR
    - · Viscosity increase
    - · Wear metals
  - End of test evaluation includes used fluid analysis and transmission component rating for sludge accumulation



9 © 2018 Infineum International Limited. All Rights Reserved. 2018012

Performance you can rely on.

### Oxidation test in ATF - DKA

- DKA (or CEC L-48-A-95 method) is mostly used in Europe
  - Test tube 100 ml of fluid sample
  - Air flow 5L/hr
  - Test fluid temperatures maintained at 150°C – 170°C
  - Test duration: 192 hrs
  - Fluid samples drawn at intervals throughout test and at end of test and analyzed for
    - Change in KV40°C and KV100°C
    - TAN increase
    - Differential IR
    - · Insoluble content and varnish deposit







### Oxidation test in ATF - ISOT

- Indiana Stirring Oxidation Test is designed to evaluate an automatic transmission fluid's oxidation resistance, thermal stability, and material compatibility characteristics; mostly used in Japan
  - Test tube 250 ml of fluid sample
  - Temperature can vary (150-165°C);
     SOP is 165.5°C (+/-0.5°C)
  - Test duration can range from 48 hrs to 500 hrs; SOP is 96 hrs
  - Stirrer RPM at 1300 rpm (+/- 15)
  - Steel and copper catalyst ring added to sample during testing
    - · Change in KV100°C, KV Ratio
    - TAN increase
    - Differential IR, @carbonyl (1725 cm-1)
    - Copper corrosion
    - · Varnish stick rating





© 2018 Infineum International Limited All Rights Reserved. 201801

Performance you can rely on.

## Ford and GM specification comparison

	100°C Viscosity	-40°C Brookfield	Shear stability	Oxidation	Friction durability	Anti- shudder durability ◊
MERCON® V	6.8 cSt MIN	13,000 cP MAX	6.0 cSt MIN (20hr KRL)	+	++	+
MERCON® LV*	6.2 cSt MIN	13,000 cP MAX	5.5 cSt MIN (20hr KRL)	++	+++	++
DEXRON® - VI	6.4 cSt MAX	15,000 cP MAX	5.5 cSt MIN (40hr KRL)	+++	+++	+

<sup>\*</sup> Predicted since spec not released



<sup>♦</sup> Material specific

### **Permissions**

Permission is given for storage of one copy in electronic means for reference purposes. Further reproduction of any material is prohibited without prior written consent of Infineum International Limited.

The information contained in this document is based upon data believed to be reliable at the time of going to press and relates only to the matters specifically mentioned in this document. Although Infineum has used reasonable skill and care in the preparation of this information, in the absence of any overriding obligations arising under a specific contract, no representation, warranty (express or implied), or guarantee is made as to the suitability, accuracy, reliability, or completeness of the information; nothing in this document shall reduce the user's responsibility to satisfy itself as to the suitability, accuracy, reliability, and completeness of such information for its particular use; there is no warranty against intellectual property infringement, and Infineum shall not be liable for any loss, damage or injury that may occur from the use of this information other than death or personal injury caused by its negligence. No statement shall be construed as an endorsement of any product or process. For greater cartiny, before use of information contained in this document, particularly if the product is used for a purpose or under conditions which are abnormal or not reasonably foreseeable, this information must be reviewed with the supplier of such information.

Links to third party websites from this document are provided solely for your convenience. Infineum does not control and is not responsible for the content of those third party websites. If you decide to access any of those websites, you do so entirely at your own risk. Please also refer to our Privacy Policy.

'INFINEUM', the interlocking Ripple Device, the corporate mark comprising INFINEUM and the interlocking Ripple Device and 消疫联 are trademarks of Infineum International Limited.

 $\hbox{@ 2018}$  Infineum International Limited. All rights reserved. 2018012

