

## **China Car Air Conditioning Industry Report, 2009**

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## 2. Status Quo of China Car Air-conditioner Industry

### 2.2 Car Air-Conditioning Compressor

Car air-conditioning system mainly consists of the compressor, condenser, evaporator and heater. As compressor is the heart of car air conditioning system, the status of the compressor market directly affects the prospect of the car air-conditioning industry.

China's car air-conditioning compressor market has shown the momentum of rapid growth since 2003. Statistics show that the total compressor output reached nearly \*\* units in 2008, up 24.42% year on year; the total sales volume was \*\* units, up 13.95% year on year. The output of foreign enterprises was \*\* units in 2008, accounting for \*\* of China's total passenger car compressor output. The OE market is in general dominated by foreign enterprises. The industry competition is more intense. OE price dropped from RMB1200/unit in 2001 to RMB800/unit in 2005, and decreased by 7.5%-9.5% annually in 2005-2009. In addition, Chinese enterprises are lagging behind foreign enterprises in research and development capability, which has caused the flow of Chinese products mainly to the aftermarkets of China and foreign countries.

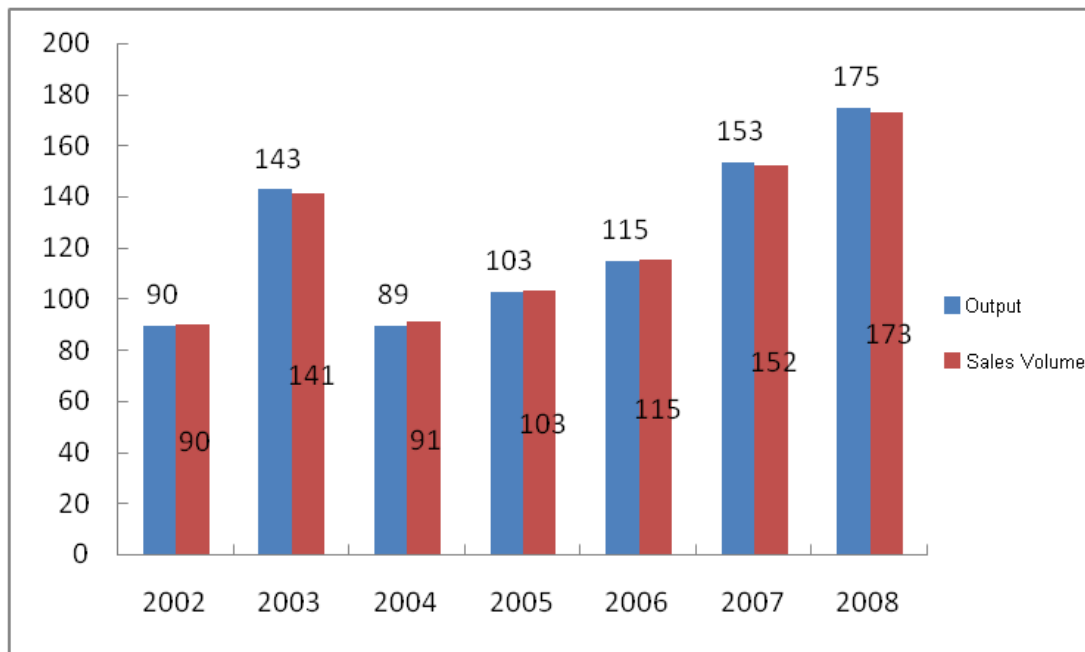
#### ***Output and Sales of China Car Air-Conditioning Compressor, 2002-2008***

***(Omitted)***

### 2.3 Car Air-Conditioning Condenser

In 2004-2008, China's car air-conditioning condenser market had experienced rapid growth. China's car air-conditioning condenser sales volume reached 1.73 million units in 2008, up 13.8% year on year.

**Output and Sales of China Car Air-Conditioning Condenser, 2002-2008 (10,000 Units)**



Source: China Association of Automobile Manufacturers

### **3. Key Manufacturers**

The manufacturers of car air conditioner and air-conditioning compressor comes primarily from Japan, the USA and Germany, such as Denso, Shanghai Sanden Behr Automotive Air Conditioning Co., Ltd, Zexel and DELPHI, which all have wholly-owned subsidiaries or joint ventures in China to put on production. Among them, Japanese manufacturers take the largest output. In addition, Chongqing Jianshe Automobile A/C Co., Ltd., and Mudanjiang Car Conditioning Compressor Company also take some certain market share.

#### ***Market Occupancy of Leading Car Air Conditioner Manufactures***

***(Omitted)***

#### **3.1 Shanghai Sanden Behr Automotive Air Conditioning Co., Ltd**

Shanghai Sanden Behr Automotive Air Condition-ing Co., Ltd. (original: Shanghai Ek Chor General Machinery Co., Ltd.) is a Joint Venture established by four parties, as Shanghai Auto-mobile Stock Company, Shanghai Long-hua Industry Company, Japan Sanden Co., Ltd. and German Behr Co., Ltd.. There are four subordinated enterprises as Sanden (Shanghai) Automotive Air-conditioning Co. Ltd. and Shanghai Behr Thermal Systems Co., Ltd. The company has abilities of synchronized development, system design and supply modularization, boasting China's largest designated manufacturer engaging in the production of car air conditioners and car air-conditioning compressors. Covering an area of 85,295 sq m with 1,000 employees, the total investment and registered capital of the company are US\$74.6 million and US\$29.84 million.

Since 1989, the company introduced the technology for producing SD5-series air-conditioning compressors from Japan Sanden and the technology for producing V5-series air-conditioning compressors from DELPHI. After the capital restructuring of the company was successfully completed in 2004, the company began to import technology platform of PXE compressor products from Japan Sanden. At present, PXE compressor products has been used in PQ24 and PQ 35 series under Volks Wagen and won acclaim from the Germany giant in car industry. Shanghai Sanden Behr Automotive Air Condition-ing Co. plans to provide supporting products for SGM's full series of EPSILON II cars.

The main clients of the company include SVW, SGM, FAW,BJC, Iveco by Nanjing Automobile, CITRON, etc. its products are exported to 32 countries and regions across the globe, The company mainly targets to sedan market being supported by mini-cars and light trunk. And passenger cars and commercial cars are placed the next place.

***Compressor Products from Shanghai Sanden Behr Automotive Air Conditioning***

***(Omitted)***

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Address: Room 1008, A2, Tower A, Changyuan  
Tiandi Building, No. 18, Suzhou Street, Haidian  
District, Beijing, China 100080

Tel: 0086-10-82600828, 82600893

Fax: 00-86-10-82601570

Mail: [report@researchinchina.com](mailto:report@researchinchina.com)