

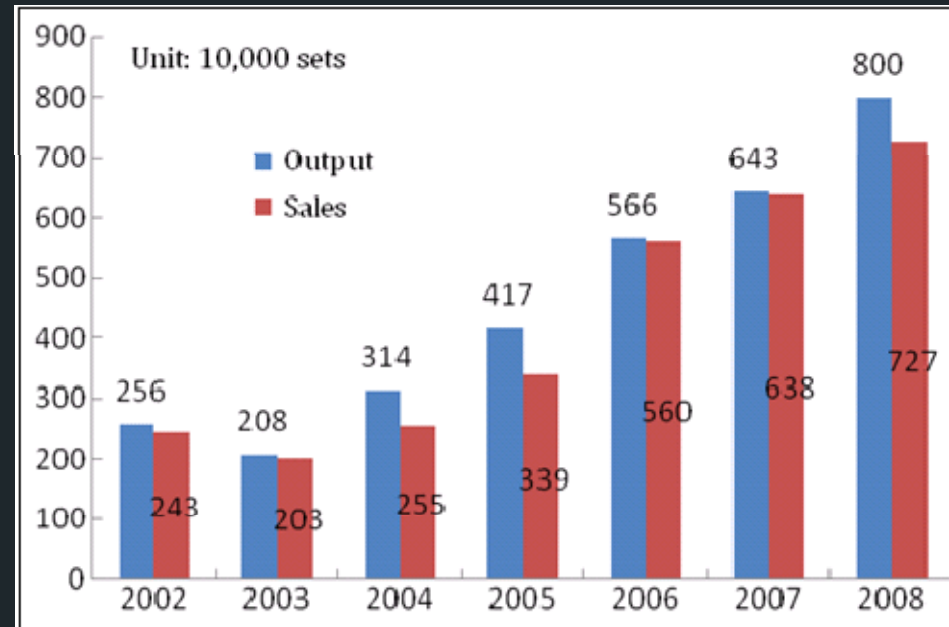
China Car Air-conditioning Industry Report, 2009



The car air-conditioning system mainly consists of compressor, condenser, evaporator and air heater, wherein, compressor is the heart, thus the status quo of compressor market directly relates with the development prospect of car air conditioning industry.

Chinese car air-conditioning compressor market kept fast growth from 2003, and the total output reached about 8 million sets in 2008, up 24.42% yr-on-yr, the total sales amounted to 7.27 million sets, up 13.95% yr-on-yr. In 2008, the output of foreign-funded enterprises was 6.27 million sets, accounting for 76.7% of total output of passenger car compressor. OEM market is mostly monopolized by foreign-funded enterprises, and the industry competition becomes increasingly fierce. From 2001 to 2005, the price dropped from RMB1,200/set to RMB800/set, and from 2005 to 2009, the price decreased by 7.5-9.5% annually on average. Furthermore, Chinese enterprises are relatively lagged behind in research and development, which causes the Chinese products mainly to flow to after-sales markets in China and abroad.

Output & Sales of China Car Air Conditioning Compressor, 2002-2008



Source: China Association of Automobile 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.

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