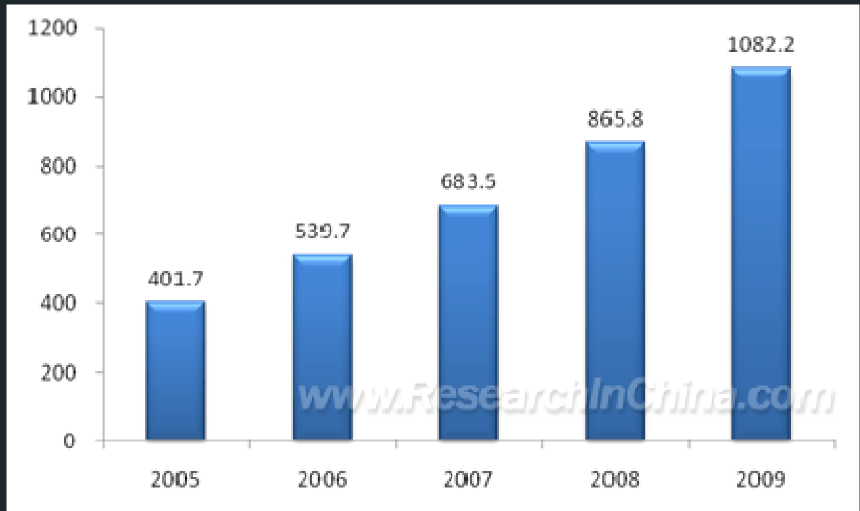
China Auto Parts Industry Report, 2010

Benefitting from the rapid development of the automotive industry, China's auto parts industry has witnessed increasingly fast development in recent years. China's auto parts and accessories manufacturing industry realized a total industrial output value of RMB1.0822 trillion in 2009, up 20.39% year-on-year. In Feb., 2010, the number of auto parts manufacturers above designated size (i.e. with annual sales revenue exceeding RMB 5 million) rose to 10,788, and the number of employees also exceeded two million, both were better than the year of 2009.

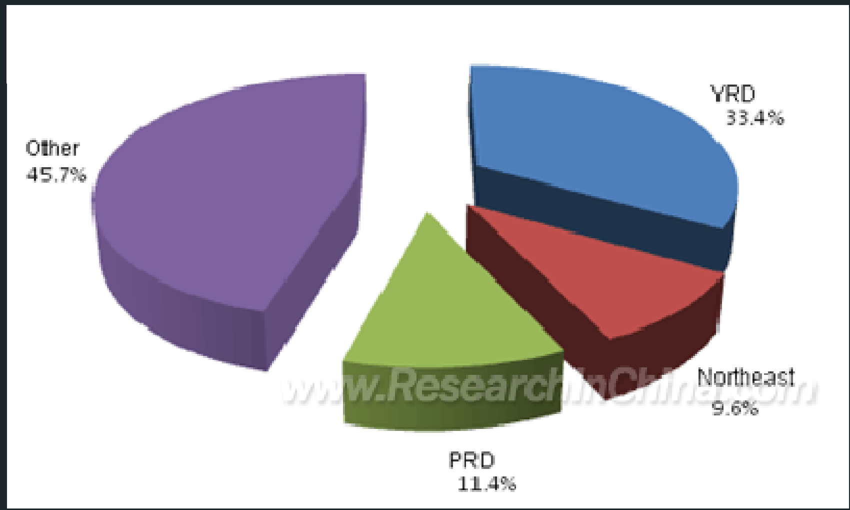
Total Industrial Output Value of China's Auto Parts and Accessories Manufacturing Industry, 2005-2009 (RMB bn)



Source: China Association of Automobile Manufacturers

From the perspective of regional distribution, China's auto parts industry has conspicuous clustering feature, and has formed large auto parts manufacturing clusters in Yangtze River Delta (YRD), Pearl River Delta (PRD) and Northeast. It mainly relies on Shanghai VW, Shanghai GM, Chery, Jiangsu Yaxing, Nanjing Jinling and Nanjing FIAT in YRD, Guangzhou Honda and Guangzhou Aeolus in PRD, and FAW in Northeast, the total industrial output value of auto parts and accessories of the three regions accounted for 54.3% of China's total.

Total Industrial Output Value of China's Auto Parts and Accessories Manufacturing Industry by Region, 2009



Source: China Association of Automobile Manufacturers

From the perspective of product, foreign brands mainly dominate the fields such as auto glass, auto tires and car audio. In 2009, among the top five car glass OEMs by market share, three were foreign brands; and of the top five auto tire and car audio manufacturers by original market shipment, four were foreign brands as well. However, auto engine was mainly domestically produced, and the top five auto engine manufacturers by sales were Yuchai, Dong'an Auto Engine, Weichai Power, Dongfeng Cummins and Shanghai Diesel Engine, only Dongfeng Cummins was a Sino-foreign joint venture.

Market Shares of China's Key Auto Parts Manufacturers, 2009

Source: ResearchInChina

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