

## Global and China Automotive Air Conditioner Industry Report, 2009-2010



Japan is an overlord in household air-conditioner field worldwide thanks to its most advanced technology in the core upstream component--compressor. Many Japanese enterprises, including Daikin, Hitachi, Panasonic, Toshiba, Mitsubishi Heavy Industries and Mitsubishi Electric, are the key players in compressor industry. As such, American enterprises still have competitive strength in high-power air-conditioning compressor industry, represented by Carrier, Trane, Copeland and York. Accordingly, the automotive air-conditioner field is dominated by Japanese enterprises and American counterparts.

Denso continues its leading role in the sector. Together with Toyota Industries, which is the largest manufacturer of automotive air-conditioning compressor in the world, the collective market share of the two surpasses one third of the total. Automotive air-conditioner or compressor products of Denso have been used by the world's well-known automakers. At the early stage, Denso built massive business in compressor sector. After 2000, Denso began to transfer compressor business to Toyota Industries and focus on the design and sales of the whole system of air-conditioners. Besides, Denso cooperated with Toyota Industries to establish compressor base in overseas country. And Toyota Industries holds always as high as 65% shares of the project. Toyota Industries only produces compressor.

The auto air-conditioner technology of Valeo stems from ZEXEL which originated from DKK. As the biggest producer of diesel fuel injection in Asia, DKK was founded in 1939 with its technology from Bosch. In 2000, ZEXEL was purchased by Bosch, and Bosch only retained diesel injection business and it sold in 2005 its compressor business to Valeo with €100 million. Since then, the joint venture had become the wholly-owned subsidiary of Valeo. Although the compressor business is not its core operation, ZEXEL still boasts the exceedingly excellent compressor technology.

About 70% revenue of Calsonic Kansei, a membership of Nissan Group, comes from Nissan which holds 32% shares of the company. Calsonic Kansei originally cooperated with Harrison (affiliated to Delphi Corporation) to produce auto air-conditioning compressor, and later acquired compressor business of NSK, which has gained favor from BMW due to its state-of-the-art technology. In particular, BMW contributes more than 70% to revenue of NSK from compressor business. Yet, NSK rests its core business with timing equipments. It is beyond doubt that Calsonic Kansei becomes the supplier of BMW after the acquisition.

Keihin, a carburetor giant, has also made remarkable achievements in compressor sector. In spite of not being compared with the three leading manufacturers aforementioned, Keihin has developed exceedingly loyal clients after years' cooperation with Toyota. Additionally, there has JCS, an up-rising star co-funded by Mazda, Visteon and Panasonic. JCS is expected to witness a bright prospect since it has reliable customers like Mazda and Ford.

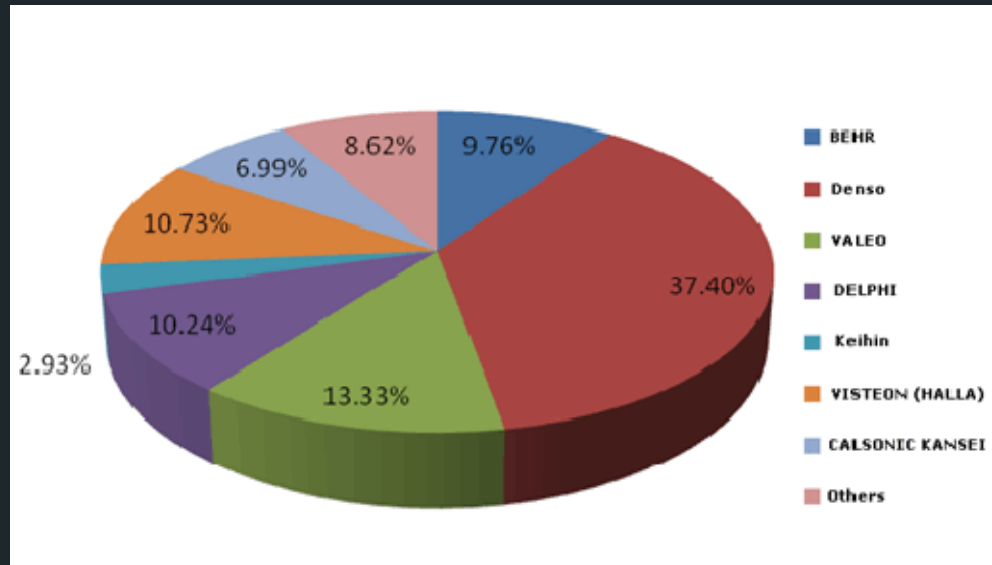
Although it is in hardship, Delphi Corp. never tends to quit its core business – automotive thermal system. As the former world's largest manufacturer of auto air-conditioning compressor, Delphi Corp. has long teamed up with Harrison to produce compressors. As an enterprise with 100-year history, Harrison has won a host of faithful customers including Fiat, PSA and Renault apart from its VIP client--GM.

Visteon shares a slice of pie in auto air conditioner field by its role as a share holder of Halla Climate Control Corp. Similar to Delphi Corp, Visteon also concentrates on its automotive thermal system business and has no intention to quit auto air conditioner business. Moreover, Visteon has obtained over 60% auto air conditioner business from Hyundai by relying on Halla Group.

Being short of technology support, Behr, a German enterprise, joins hands with the second largest air-conditioning compressor manufacturer in Japan - Sanden to offset its demerit. In general, the air-conditioner system of Behr employs the compressor produced by Sanden. In recent two years, Behr has been to the bad ceaselessly while the profit of Sanden dropped not so much.

Chinese manufacturers are professional in after-sale maintenance market, which makes China be the largest maintenance base of automotive air-conditioning compressors around the globe. Chinese manufacturers feature high output, low unit price and slim profit; while the German enterprises are powerful in coach air-conditioner compressor, represented by BITZER which almost monopolizes the market.

### Market Shares of Leading Auto Air-Conditioner Manufacturers Worldwide by Shipment, 2009



HEV (Hybrid Electrical Vehicle) air conditioner is likely to be the development tendency of automotive air-conditioner business. The main difference between HEV and traditional automobile lies in driving energy, which requires the driving mode of air-conditioning compressors to be modified. Currently, the leading enterprises in HEV air-conditioner compressors are Sanden and Toyota Industries.

# Table of Contents

- **1. Overview of Automotive Air Conditioner**
  - 1.1 Profile of Auto Air Conditioner
  - 1.2 Profile of Auto Air Conditioner Compressor
  - 1.3 HEV Air-Conditioner Compressor
  - 1.4 History of Air Conditioner
  - 1.5 History of Air Conditioner in China
- **2. Auto Air Conditioner Market**
  - 2.1 Auto Air Conditioner Market Worldwide
  - 2.2 Auto Air Conditioner Market in China
  - 2.3 Supporting Relations between Auto Air Conditioner Manufacturers and Whole Vehicle Manufacturers
- **3. Auto Air Conditioner Industry**
  - 3.1 Auto Air Conditioner Industry Worldwide
  - 3.2 Auto Air Conditioner Industry In China
  - 3.3 Auto Air-Conditioner Compressor Industry Worldwide
  - 3.4 Auto Air-Conditioner Compressor Industry in China
- **4. Manufacturers of Automotive Air-Conditioner**
  - 4.1 Sanden
    - 4.1.1 Shanghai Sanden Behr Automotive Air Conditioning Co., Ltd.
    - 4.1.2 Shanghai Sanden Automotive Air Conditioning Co., Ltd.
    - 4.1.3 Tianjin Sanden Auto Air-Conditioning Co., Ltd
    - 4.1.4 Suzhou Sanden Precision Components
  - 4.2 Denso
    - 4.2.1 Yantai Shougang DENSO Co., Ltd
    - 4.2.2 Tianjin FAWER DENSO Air-Conditioner Co., Ltd.
    - 4.2.3 DENSO (Tianjin) Thermal Products Co., Ltd
    - 4.2.4 Guangzhou Denso Co., Ltd
    - 4.2.5 TACK
  - 4.3 BEHR

- 4.3.1 Dongfeng Behr Thermal Systems Co., Ltd
- 4.3.2 Shanghai Behr Thermal Systems Co., Ltd. (SBTS)
- 4.3.3 Behr-Hella Thermocontrol (Shanghai) Co., Ltd.
- 4.4 CALSONIC KANSEI
- 4.4.1 Calsonic Kansei (Shanghai) Technology Xiangfan
- 4.4.2 Calsonic Kansei Technology Wuxi
- 4.4.3 Calsonic Kansei Auto Electronics (Wuxi)
- 4.4.4 Calsonic Kansei Automotive Technology (Guangzhou)
- 4.5 Songz Automobile Air Conditioning Co.,Ltd
- 4.6 Valeo
- 4.6.1 Valeo Automotive Air-conditioning (Hubei) Co.Ltd
- 4.6.2 Valeo Compressor (Changchun) Co., Ltd
- 4.6.3 Huada (Hunan) Automotive Air-Conditioning Co., Ltd
- 4.6.4 FAW ZEXEL
- 4.7 Visteon
- 4.7.1 Visteon Climate Control (Beijing) Co., Ltd
- 4.7.2 Visteon (Nanchang) Auto Air-Conditioning
- 4.8 Halla Climate Control Corp.
- 4.8.1 Halla (Dalian) Air-Conditioning
- 4.9 Delphi Corp.
- 4.9.1 Shanghai Delphi Automotive Air Conditioning Systems Co. Ltd.
- 4.10 Nanjing Aotecar Refrigerating Co., Ltd
- 4.11 Jiangsu Zhunti Machinery Manufacture Co., Ltd.
- 4.12 Taizhou SaiMa Auto Parts Co., Ltd
- 4.13 Liuzhou Yizhou Automobile Air-Conditioner Co., Ld
- 4.14 Sichuan Tianquan Air Conditioner Co., Ltd
- 4.15 Mudanjiang Foton Automotive Air Conditioner Co., Ltd
- 4.16 KEIHIN
- 4.16.1 Dong Guan Keihin Engine Management System Co., Ltd
- 4.17 Zhongcheng Air-Conditioning Compressor
- 4.18 Chongqing JianShe Automobile Air Conditioner Co., Ltd
- 4.19 Nanjing Yinmao Compressor Co., Ltd
- 4.20 Mitsubishi Air-Conditioning (Shanghai) Co., Ltd

- 4.21 Toyota Industries
- 4.22 Japan Climate Systems Corporation
- 4.23 Bitzer
  
- **5. Global Automotive Market**
  
- **6. China Automotive Market**
- 6.1 Automotive Market, 2010H1
- 6.2 Passenger Car Market, 2010
- 6.3 Commercial Car Market, 2010 H1
- 6.4 Import & Export of Vehicles, 2010
- 6.5 Trend of Car Consumption
- 6.6 Recorded Data of Automotive Market, 2005-2010
- 6.7 China Automotive Industry

## Selected Charts

- Global Automotive Air-Conditioner Market Size (by Value), 2008-2013
- Global Automotive Air-Conditioner Market Size (by Shipment), 2008-2013
- China Automotive Air-Conditioner Market Size (by Value), 2008-2013
- China Automotive Air-Conditioner Market Size (by Shipment), 2008-2013
- Supporting Relations between Auto Air-Conditioner Manufacturers and Whole Vehicle Manufacturers, 2009
- Market Shares of Leading Auto Air-Conditioner Manufacturers by Shipment Worldwide, 2009
- Market Shares of Leading Auto Air-Conditioner Manufacturers by Value Worldwide, 2009
- Market Shares of Auto Air-Conditioner Manufacturers in China, 2009
- Market Shares of Leading Auto Air-Conditioner Compressor Manufacturers by Shipment Worldwide, 2009
- Market Shares of Leading Auto Air-Conditioner Compressor Manufacturers by Value Worldwide, 2009
- Market Shares of Auto Air-Conditioner Compressor Manufacturers by Value in China, 2009
- Market Shares of Auto Air-Conditioner Compressor Manufacturers by Shipment in China, 2009
- Revenue and Operating Margin of Sanden, FY2006-FY2011
- Revenue and Operating Margin of Sanden, 2008Q2-2010Q1
- Revenue of Sanden by Product, 2006-2011
- Shipment and Sales of Sanden Auto Air-Conditioner Compressor, 2008-2011
- Revenue of Sanden by Region, FY2008-FY2011
- Revenue and Operating Margin of Shanghai Sanden Behr Automotive Air Conditioning Co., Ltd, 2004-2009



- Revenue and Operating Margin of Shanghai Sanden Automotive Air Conditioning Co., Ltd, 2004-2009
- Revenue and Operating Margin of Tianjin Sanden Automotive Air Conditioning Co., Ltd, 2004-2009
- Revenue and Operating Margin of Denso, FY2006-FY2010
- Client Structure & Proportions of Denso, FY2008-FY2010
- Product Structure & Proportions of Denso, FY2008-FY2010
- Organization Structure of Yantai Shougang Denso Co., Ltd
- Revenue of Shougang Denso, 1997-2007
- Distribution of Shougang Denso Plants
- Revenue and Operating Margin of Tianjin FAWER DENSO Air-Conditioner, 2006-2009
- Revenue and Operating Margin of Guangzhou Denso, 2004-2009
- Revenue and EBT Margin of BEHR, 2005-2010
- Number of Employees, Proportion of R&D Expenditure in Revenue of BEHR, 2005-2009
- Revenue of BEHR by Region, 2005-2009
- Sales of BEHR in Developing Countries, 2005-2009
- Revenue of BEHR by Product, 2005-2009
- Employees Distribution of BEHR by Region, 2005-2009
- Sales Volume of Air Conditioners of BEHR, 2008 vs. 2009
- Sales Volume of Engine Cooling Systems of BEHR, 2008 vs. 2009
- BEHR Presence in Asia
- Customer Distribution of Shanghai Behr Thermal Systems
- Revenue and Operating Margin of Calsonic Kansei, FY2004-FY2011
- Revenue of Calsonic Kansei by Region, FY2009-FY2011
- Operating Margin of Calsonic Kansei by Region, FY2009-FY2010

- Equipment Investment and R&D Funds of Calsonic Kansei, 2007-2011
- Revenue and Operating Margin of Calsonic Kansei (Shanghai) Technology Xiangfan, 2006-2010
- Revenue and Operating Margin of Calsonic Kansei (Wuxi) Technology, 2004-2009
- Revenue and Operating Profit Margin of Calsonic Kansei Automotive Technology (Guangzhou), 2005-2009
- Revenue and Operating Margin of Songz Automobile Air Conditioning, 2007-2013E
- Sales of Valeo, 2008Q1-2010Q1
- Gross Margin of Valeo, 2008Q1-2009Q4
- Operating Margin of Valeo, 2008Q1-2009Q4
- Revenue from OEM Sector of Valeo by Region, 2009
- Revenue and Operating Margin of Valeo Automotive Air-conditioning (Hubei), 2004-2009
- Revenue and Operating Margin of Huada (Hunan) Automotive Air-Conditioning, 2004-2009
- Revenue and Operating Income of FAW ZEXEL
- Revenue and Gross Margin of Visteon, 2004-2009
- Revenue of Visteon by Country, 2008-2009
- Revenue of Visteon by Product, 2007-2009
- Revenue and Operating Margin of Visteon Climate Control (Beijing) Co., Ltd
- Revenue and Operating Margin of Halla Climate Control Corp., 2006-2009
- Revenue and Operating Margin of Halla (Dalian) Air-Conditioning, 2006-2009
- Revenue and Gross Margin of Delphi, 2004-2009
- Revenue of Delphi by Region, 2005 vs.2009
- Number of Employees of Delphi by Region Worldwide, 2009
- Revenue of Delphi by Product, 2006-2008
- Customer Distribution of Delphi, 2006-2008

- Revenue and Operating Margin of Shanghai Delphi Automotive Air Conditioning Systems, 2004-2009
- Revenue and Operating Margin of Nanjing Aotecar Refrigerating, 2004-2010
- Revenue and Operating Margin of Jiangsu Zhunti Machinery Manufacture, 2004-2009
- Revenue and Operating Margin of Mudanjiang Foton Automotive Air Conditioner, 2004-2011
- Revenue and Operating Margin of KEIHIN, 2005-2011
- Revenue and Operating Margin of KEIHIN, FY2005-FY2011
- Revenue of Keihin by Region, FY2005-FY2011
- Revenue of Keihin by Product, FY2005-FY2008
- Customer Distribution of Chongqing JianShe Automobile Air Conditioner
- Revenue and Operating Margin of Chongqing JianShe Automobile Air Conditioner, 2004-2009
- Revenue and Sales Volume of Chongqing JianShe Automobile Air Conditioner, 2004-2009
- Revenue and Operating Income of Toyota Industries, FY2005-FY2011
- Revenue of Toyota Industries by Product, 2008-2011
- Revenue from Compressor Business of Toyota Industries, FY2008-FY2011
- Sales Volume of Compressors of Toyota Industries, FY2005-FY2011
- Monthly Sales of China Automotive Industry, 2006-2010
- Yearly Sales of China Automotive Industry, 2003-2010
- Year-on-Year Sales of China Automotive Industry by Month, Jan.2008-May2010
- Monthly Sales of Chinese Passenger Car Sub-Sectors, Jan.2005-May2010
- Monthly Sales of Chinese MPV Sub-Sectors, Jan.2005-May2010
- Monthly Sales of Chinese SUV Sub-Sectors, Jan.2005-May2010
- Sales and Growth Rates of Top 10 Automakers (by Sale), Jan.-May, 2010
- Sales and Growth Rates of Top 10 Passenger Car Manufacturers (by Sale), Jan.-May, 2010

- Sales and Growth Rates of Top 10 Commercial Car Manufacturers (by Sale), Jan-May, 2010
- Ranking by Revenue of 26 Auto Air Conditioner Manufacturers in China, 2009
- Revenue and Shipment of 11 Auto Air-Conditioner Compressor Manufacturers in China, 2009
- Revenue, Profit, Export Value (Auto Air-Conditioner), and Employees of Denso in China, 2008
- Revenue, Profit, Export Value, Employees of Calsonic Kansei (China), 2008
- Air-Conditioner Sales Volume of Songz Automobile Air Conditioning
- Capacity and Output of Songz Automobile Air Conditioning, 2007-2009
- Sales Volume and Sales Value of Songz Automobile Air Conditioning, 2007-2009
- Average Price of Air Conditioners of Songz Automobile Air Conditioning, 2007-2009
- Cost Structure of Songz Automobile Air Conditioning, 2007-2009
- 5 Leading Suppliers of Songz Automobile Air Conditioning, 2009
- Revenue of Delphi by Region, 2006-2008
- Monthly Revenue & Profit Growth of Major Automakers, Mar.2009-Mar.2010

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