

Global and China Bearing Industry Report, 2009-2010



In 2009, affected by the global financial crisis, the global sales of bearings fell by 12.5% year on year to USD34 billion; due to the continuous downturn of the automotive industry, the contribution of automotive bearing to the total sales of bearings dropped to less than 30%, while the machinery bearing's grew to over 40%. At the same time, the world's eight major bearing companies all saw sales decline, as shown below:

Sales and YoY Growth Rate of Eight Major Bearing Manufacturers in the World, (FY) 2009

Enterprise	Sales (USD mln)	YoY Growth Rate
JTEKT (Japan)	10938.5	-3.8%
Schaeffler (Germany)	10474.0	-17.9%
SKF (Sweden)	7858.0	-11.3%
NSK (Japan)	6965.3	-16.1%
NTN (Japan)	5669.3	-1.3%
TIMKEN (USA)	3141.6	-37.3%
Minebea (Japan)	2755.6	-23.4%
NACHI (Japan)	1157.3	-47.5%

Source: ResearchInChina

By contrast, China has maintained rapid growth driven by the strong market demand. In 2009, China's roller bearing output reached 12.51 billion sets, up 15.1% year on year; the apparent consumption reached 11.13 billion sets, up 21.8% year on year; the import value increased by 5%.

This report analyzes the status quo of bearing markets at home and abroad, and focuses on the demand and enterprise competition in market segments including automotive bearing, railway bearing, wind power bearing and so on.

1. Automotive Bearing

The rapid development of China's automotive industry has promoted significant increase of demand for automotive bearing in recent years. China sold 13.64 million cars and 680 million sets of automotive bearings in 2009. In 2010, China is expected to sell 17 million cars and 850 million sets of automotive bearings, given each car needs about 50 sets of bearings (including those for maintenance and repair).

2. Railway Bearing

In 2009, the operating mileage of China's railway reached 86,000 km, surpassing Russia to rank second in the world. In the future, China will build over 40,000 km of railway, which will offer a vast development space for railway bearing and create demand for 3.8 million sets of railway bearings in 2010.

In the field of railway bearing, WAFANGDIAN BEARING, LUOYANG LCY BEARING, HRB and TIANMA BEARING have remarkable advantages. Among them, LUOYANG LCY BEARING is a leader in railway passenger car bearing market; WAFANGDIAN BEARING and TIANMA BEARING are the leaders in Chinese freight car bearing market.

In addition, the report also focuses on 10 domestic enterprises, including WAFANGDIAN BEARING, LUOYANG LCY BEARING, HRB, XIANGYANG AUTOMOBILE BEARING, XIBEI BEARING, C & U GROUP and so on.

WAFANGDIAN BEARING is good at the manufacturing of large precision bearings; HRB targets at precision and high precision bearings, with 60% -70% shares in aerospace bearing market.

LUOYANG LCY BEARING is famous for railway bearing, with about 30% market shares; C & U GROUP has advantages in small and precision household and office bearings.

TIANMA BEARING performs well in short cylindrical roller bearing and railway freight car bearing. It has begun to enter the field of wind power bearing and railway bearing in recent years.

WANXIANG QIANCHAO takes a leading position in Chinese wheel hub bearing and wheel hub bearing unit market, with about 30% market shares. In the future, it will focus on the development of constant velocity drive shaft and wheel hub unit.

XIANGYANG AUTOMOBILE BEARING is a key automotive bearing enterprise in China. After years of unsuccessful efforts in reorganization, it finally reached a restructuring agreement with Tri-Ring Group in 2009.

LONGXI BEARING is the only domestic enterprise specializing in the manufacturing of joint bearing, with more than 60% shares in the domestic market and about 12% shares in the international market.

XIBEI BEARING is a leading oil machinery bearing enterprise in China, with 80% shares in the domestic market. It is also the only manufacturer of high-speed railway bearing in China. It has set foot in wind power bearing in recent years.

LUOYANG BEARING SCIENCE & TECHNOLOGY has the only Ministry-owned state Class-1 large scientific research institute in China's bearing industry. Now, it has held a strongly competitive position in the field of high-grade, precision and sophisticated bearing.

Table of Contents

- **1. Brief Introduction to Bearing**
 - 1.1 Definition
 - 1.2 Classification
 - 1.3 Industry Characteristics
 - 1.3.1 Periodicity
 - 1.3.2 Upstream and Downstream
- **2. Development of Global Bearing Industry**
 - 2.1 Market Scale
 - 2.2 Supply
 - 2.3 Demand
 - 2.3.1 Regions
 - 2.3.2 Products
- **3. China's Bearing Industry**
 - 3.1 Policy Environment
 - 3.1.1 Supporting Policies for Key Products
 - 3.1.2 Import and Export Policies
 - 3.1.3 Foreign Access Policies
 - 3.2 Industry Operation
 - 3.2.1 Income
 - 3.2.2 Profit
 - 3.3 Market Analysis
 - 3.3.1 Supply and Demand
 - 3.3.2 Import and Export
 - 3.4 Competitive Structure
 - 3.4.1 Industry Concentration
 - 3.4.2 Regions
 - 3.4.3 Companies
- **4. Bearing Market Segments**
 - 4.1 Automotive Bearing
 - 4.1.1 Overview
 - 4.1.2 Market Demand
 - 4.1.3 Enterprise Competition
 - 4.2 Railway Bearing
 - 4.2.1 Overview
 - 4.2.2 Market Demand

- 4.2.3 Enterprise Competition
- 4.3 Wind Power Bearing
 - 4.3.1 Overview
 - 4.3.2 Market Supply and Demand
 - 4.3.3 Enterprise Competition
- 4.4 Construction Machinery Bearing
 - 4.4.1 Overview
 - 4.4.2 Market Demand
- 4.5 Metallurgical and Mining Machinery Bearing
 - 4.5.1 Overview
 - 4.5.2 Market Demand
 - 4.5.3 Enterprise Competition
- 4.6 Other Bearing Markets
 - 4.6.1 Petrochemical Bearing
 - 4.6.2 Machine Tool Bearing
 - 4.6.3 Home Appliance Bearing
- **5. International Bearing Companies**
 - 5.1 SKF
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Distribution in China
 - 5.2 NSK
 - 5.2.1 Profile
 - 5.2.2 Operation
 - 5.2.3 Development in China
 - 5.3 NTN
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Development in China
 - 5.4 MINEBEA
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Development in China
 - 5.5 TIMKEN
 - 5.5.1 Profile
 - 5.5.2 Operation
 - 5.5.3 Development in China
 - 5.6 SCHAEFFLER
 - 5.6.1 Profile
 - 5.6.2 Operation
 - 5.6.3 Development in China

- 5.7 NACHI
- 5.7.1 Profile
- 5.7.2 Operation
- 5.7.3 Development in China
- 5.8 JTEKT
- 5.8.1 Profile
- 5.8.2 Operation
- 5.8.3 Development in China
- **6. Chinese Bearing Companies**
- 6.1 WAFANGDIAN BEARING GROUP CORP.
- 6.1.1 Profile
- 6.1.2 Operation
- 6.1.3 Product R & D
- 6.1.4 Development Strategy
- 6.2 LUOYANG LCY BEARING CO., LTD.
- 6.2.1 Profile
- 6.2.2 Operation
- 6.2.3 Key Projects and Progress
- 6.3 HRB
- 6.3.1 Profile
- 6.3.2 Operation
- 6.3.3 Development Strategy
- 6.4 ZHEJIANG TIANMA BEARING CO., LTD.
- 6.4.1 Profile
- 6.4.2 Operation
- 6.4.3 Key Projects
- 6.5 XIANGYANG AUTOMOBILE BEARING CO., LTD.
- 6.5.1 Profile
- 6.5.2 Operation
- 6.5.3 Competitive Advantages
- 6.6 FUJIAN LONGXI BEARING (GROUP) CO., LTD.
- 6.6.1 Profile
- 6.6.2 Operation
- 6.6.3 Key Projects and Progress
- 6.7 LUOYANG BEARING SCIENCE & TECHNOLOGY CO., LTD.
- 6.7.1 Profile
- 6.7.2 Operation
- 6.7.3 Key Projects and Progress
- 6.8 XIBEI BEARING CO., LTD.
- 6.9 C&U GROUP
- 6.10 WANXIANG QIANCHAO CO., LTD.

Selected Charts

- Classification of Bearings
- Schematic Diagram of Bearing
- Correlation between Japan's Bearing Industry and Macro-economy
- Downstream Bearing Market and Proportion
- Correlation between Bearing Industry and Automotive Industry
- Output Value and Sales of Bearing in Japan, 2005-2010
- Main Products and Sales of 8 Major Bearing Companies in the World, (FY)2009
- Global Bearing Demand Structure (by Region), 2009
- Key Bearing Products in China during "Eleventh Five-Year" Period
- Preferential Import Tax Rate for Some Bearing Products in China
- Sales Revenue and YoY Growth Rate of China's Bearing Industry, 2004-2010
- Total Profit and YoY Growth Rate of China's Bearing Industry, 2004-2010
- Output and YoY Growth Rate of Rolling Bearing in China, 2004-2010
- Apparent Consumption of Roller Bearing in China, 2006-2010
- Import & Export Volume and Value of Bearing in China, 2009-2010
- TOP10 Export Destinations of Chinese Bearing, 2009
- TOP10 Countries / Regions of Origin of Import Bearings in China, 2009
- Comparison among China, Germany, USA and Japan by Bearing Industry Concentration
- Output of Roller Bearing in China (by Province & Municipality), Q1-Q3 2010
- Top 5 Chinese Bearing Enterprises by Revenue, 2009
- Sales Volume of Automobiles in China, 2003-2010E
- Demand for Automotive Bearing in China, 2009-2015



- Railway Operating Mileage, Railway Infrastructure Investment and Railway Locomotive Investment in China, 2009-2012
- Demand for Railway Bearing in China, 2009-2012
- Wind Power Installed Capacity in China, 2006-2015
- Demand for Wind Power Bearing in China, 2010-2015F
- Demand for Construction Machinery Bearing, 2008-2010E
- Demand for Metallurgical & Mining Equipment Bearing in China, 2010F
- Application Fields and Shares of Bearing Products of SKF, 2009
- Sales and Net Profit of SKF, 2004-2010
- New Bearing Products of SKF, 2009
- Bearing Business of SKF in China, 2001-2010
- Sales and Net Profit of NSK, FY2006-FY2010
- Sales of NSK (by Region), FY2008-FY2010
- Sales of NSK (by Business), FY2008-FY2010
- Medium-term Plan of NSK, FY2009-FY2013
- Sales of NSK Subsidiaries in China, 2009
- Sales of NSK China (by Business), FY2006-FY2013
- Sales and Net Profit of NTN, FY2006-FY2010
- Sales of NTN (by Business), FY2010
- Sales of Bearing Business of NTN, FY2008-FY2010
- Bearing Products and Application Fields of NTN
- Sales of Axle Bearing of NTN (by Region), FY2008-FY2010
- Sales of Needle Roller Bearing of NTN (by Region), FY2008-FY2010
- Development of NTN in China
- Main Economic Indicators of NTN Subsidiaries in China, 2008
- Sales and Net Profit of Minebea, FY2006-FY2010
- Main Bearing Products and Global Market shares of Minebea



- Sales of Minebea (by Business), FY2006-FY2010
- Sales and Operating Profit of Minebe, FY2010-FY2013E
- Main Economic Indicators of Minebea (Shanghai), 2004-2008
- Main Bearing Products of TIMKEN
- Sales and Net Profit of TIMKEN, 2006-2010
- Sales of TIMKEN (by Business), 2008-2010
- Distribution of TIMKEN in China
- Factories and Core Products of TIMKEN in China
- TIMKEN in China, 2009-2010
- Sales of Schaeffler, 2006-2010
- Development of Schaeffler in China
- Operating Income and Total Profit of Schaeffler (China) Co., Ltd., 2004-2008
- Sales and Net Profit of NACHI, FY2006-FY2010
- Bearing Sales and Proportion of NACHI, FY2006-FY2010
- Sales of NACHI in Emerging Markets, FY2006-FY2010
- Prime Operating Revenue and Total Profit of NACHI in China, 2008
- Sales and Net Profit of JTEKT, FY2006-FY2010
- Prime Operating Revenue and Total Profit of JTEKT in China, 2008
- Sales Revenue and Total Profit of WAFANGDIAN BEARING, 2004-2009
- Operating Income and Total Profit of LUOYANG LCY BEARING, 2005-2009
- Dominant Products of LYC
- Operating Income and Total Profit of HRB, 2004-2008
- Operating Income and Net Profit of TIANMA BEARING, 2007-2010
- Bearing Operating Income of TIANMA BEARING, 2007-2009
- Operating Income and Net Profit of XIANGYANG AUTOMOBILE BEARING, 2007-2010

- Operating Income of XIANGYANG AUTOMOBILE BEARING by Main Product, 2007-2009
- Operating Income and Net Profit of LONGXI BEARING, 2006-2010
- Operating Income of LONGXI BEARING (by Product), 2006-2009
- Export of LONGXI BEARING by Product
- Operating Income and Net Profit of LUOYANG BEARING SCIENCE & TECHNOLOGY, 2007-2010
- Bearing Operating Income of LUOYANG BEARING SCIENCE & TECHNOLOGY, 2007-2010
- Precision Heavy-duty Machinery Bearing Programs
- Operating Income and Net Profit of XIBEI BEARING, 2007-2010
- Bearing Operating Income of XIBEI BEARING, 2008-2009
- Operating Income of XIBEI BEARING (by Region), 2009
- Seven Bearing Production Bases and Main Products of C & U GROUP
- Operating Income and Total Profit of C & U GROUP and Shanghai C & U GROUP, 2008
- Operating Income and Net Profit of WANXIANG QIANCHAO, 2007-2010
- Operating Income of WANXIANG QIANCHAO (by Product), 2009
- Operating Income and Net Profit of WANXIANG QIANCHAO, 2009

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