



# **Global and China Automotive Aluminum Wheel Industry Report, 2010-2011**

**May 2011**

## ***This report***

- ◆ **Analyzes the global and China automobile market and manufacturers.**
- ◆ **Focuses on the global and China wheel market and industry.**
- ◆ **Highlights the operation of aluminum wheel, steel wheel, and other wheel manufacturers.**

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## Abstract

In 2010, the global aluminum wheel output reached about 200 million, up 25.9% from 159 million in 2009. It is expected that the output in 2011 will be 216.6 million, up 8.3%. China's aluminum wheel output surged by 52% from 65.6 million in 2009 to 99.80 million.

The aluminum wheel output of the European Union in 2010 was about 35 million, accounting for 17.5% of the global output instead of the previous 21%. However, the output was still 6.7% more than that in 2009.

The output of North America was 26.2 million, roughly the same with that in 2009. Superior witnessed a growth rate of 54%, HAYES LEMMERZ began to gain profit instead of suffering losses.

Japan's output reached 25.90 million, down 16% from 2009. Due to the cost pressure from Chinese enterprises, Japanese companies had to purchase more wheels from China.

China's aluminum wheel output grows rapidly and takes the first position in the world, but the unit price and gross margin of Chinese products are low. Chinese companies rank first in aluminum wheel output in the world, contributing 50% to the global output, but their output value only accounts for 36% of the global output value. The average price of aluminum wheel produced by Chinese manufacturers is only USD39, the average price of aluminum wheel produced by American manufacturers is up to USD70.7, and particularly, the average price of ALCOA's wheel for commercial vehicle surpasses USD100. The average price of aluminum wheel produced by the European Union is USD71.6, while the average price of aluminum wheel produced by Japan is the highest USD75.8.

Chinese aluminum wheel manufacturers can be divided into four categories.

First, large-scale OEMs, including Dicastal, Lizhong, Wanfeng, Foshan Nanhai Zhongnan Aluminum Wheel, Seyen Heavy Industries, Shandong KWC, Donghwa Casting, Dezhou Mercury, Jinfei.

Second, enterprises aiming at overseas aftermarket, including Tai Long, Buyang, Baokang, Shuguang, Yueling, Yuantong, Autom and Yingte, with annual income ranging from about RMB100 million to nearly RMB800 million.

Third, enterprises targeting domestic aftermarket, including Anchi, Anyu and Advanti.

Fourth, joint ventures of foreign manufacturers, usually Japanese-funded enterprises which mainly export products to Japan, including Kunshan Liufeng Machinery, LIOHO Light Metal, and ENKEI China.

China's aluminum steel industry still focuses on the export, and 64% of its revenue comes from the export. China ranked first in automobile output in the world in 2010, but foreign investors of joint ventures have the decision-making power on the purchase of automotive wheels; Japan and South Korea have their own supply systems; besides, the certification process is long, so most companies which want fast money prefer export.

The anti-dumping measures of the European Union didn't enter into force until October 28, 2010, so they did not affect the financial results of enterprises too much in 2010, but they will do so in 2011. Accounting for 12-14% of China's aluminum wheel export market, the European Union market is of significance. The steel wheel anti dumping measures taken by the United States recently exerted only a little effect. In 2010, the United States imported 2.755 million steel wheels from China with the value of USD80.44 million only.

If the United States files aluminum wheel anti-dumping charges, the consequences will be very serious. In 2010, China exported the aluminum wheels valued about USD1.4 billion to the United States, accounting for more than 50% of Chinese export market; in the United States, the tariff on aluminum wheel was only 1.5%. However, American aluminum wheel manufacturers mainly produce high-end products, and the average unit price is much higher than that of Chinese products. Chinese manufacturers and American rivals do not compete in the same field, so it is not likely that the United States will file anti-dumping charges.

Country/Region	Company	Revenue in 2010 (USD mln)	Note
Germany	RONAL	997	
USA	SII	720	
Japan	ENKEI	680	Motorcycle wheel income was not included
Japan	CMW	660	Controlled by Toyota
China	DICASTAL	644	
Germany	BORBET	555	
USA	Hayes Lemmerz	503	
Germany	UNIWHEEL	388	
Taiwan, China	LIOHO	343	Toyota' s partner
China	WANFENG	280	Motorcycle wheel income was not included
South Korea	DONGHWA	280	
Japan	TOPY	278	
China	LIZHONG	238	
China	JINFEI	225	Motorcycle wheel income was not included
USA	ALCOA	210	
China	NANHAI ZHONGNAN ALUMINUM WHEEL	165	
South Korea	KWC	142	
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