



# China Automotive Heat Exchanger Market Report, 2010-2011

June 2011

## ***This report***

- ◆ **Analyzes automotive heat exchanger market in China.**
  
- ◆ **Focuses on the key manufacturers of automotive heat exchanger in China.**

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## Abstract

Heat exchanger is a kind of equipment that transfers heat from hot fluid to cold fluid. With wide application in automotive and construction machinery vehicles, the heat exchanger falls into heater, cooler, evaporator, condenser, etc.

An automobile is equipped with one radiator at least, and most sedans and passenger cars are equipped with air conditioning systems. Each supercharged diesel engine in line with the EURO II emission regulation is equipped with one oil cooler, which is also a necessity for cars employing automatic gearbox. Furthermore, intercoolers are mounted in heavy-duty vehicles, large passenger cars, some light and medium-duty passenger cars and heavy-duty trucks, so as to meet emission standard.

With the fast development of China's auto industry, the supply capacity of auto heat exchangers is improving year by year. During the Tenth Five-Year Plan period, the CAGR of auto ownership reached 24.7% in China, while that of auto heat exchanger output realized 22.3%, in step with the advancement of China's auto industry in the main. Since the Eleventh Five-Year Plan period, the heat exchanger industry has sustained high-speed growth.

### Auto Oil Cooler, Intercooler and Radiator Market Scale in China, 2011F

	Demand for Heat Exchanger (1,000 sets)	Market Scale (RMB mln)
Oil Cooler	10,120	1,801
Intercooler	2,914	1,344.8
Auto Radiator	18,580	3,716

In the market of medium-and high-grade passenger cars which are mostly produced by joint ventures, auto radiators are largely supplied by foreign manufacturers or joint ventures. By contrast, in the small-displacement low-end passenger car market, especially in the mini-car market, car models independently designed by domestic companies take a lion's share. Thus, auto radiators are largely offered by domestic third-party auto radiator producers. This calls for more demanding requirements on the modular supply capacity, supporting R&D strengths as well as technical support of auto radiator manufacturers.

For DENSO (Tianjin) Thermal Products Co., Ltd., the sales volume of radiator in 2010 hit 2.08 million, while the sales volume of air conditioning condenser and evaporator realized 4.4 million. Other leading radiator assembly manufacturers include Nanning Baling Technology, Weifang Hengan Radiator Group, etc.

In 2010, the sale volume of auto air conditioning systems of Shanghai Behr Thermal Systems touched 650,000 sets. Other leading auto air conditioning manufacturers include Shanghai Delphi Automotive Air-Conditioning System, Guangzhou Denso, etc.

Zhejiang Yinlun Machinery Co., Ltd. is a privately-owned heat exchanger enterprise, with the operating income in 2010 realizing RMB1.473 billion. In 2010, its sales volume of auto oil cooler surpassed 4.5 million sets, and that of supercharged intercooler exceeded 360,000 sets, both topping the list nationwide.

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