



# China Automotive Plastic Parts Industry Report, 2011-2015

Aug. 2011

## ***This report***

- ◆ **Analyzes China automotive auto parts industry**
- ◆ **Focuses on China auto plastic parts industry and auto plastic parts market segments**
- ◆ **Highlights the enter barrier and investment of auto plastic parts industry, also key players.**

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## Abstract

The global consumption of plastic for per car by late 1990s averaged 50-60kg, with the figure in 2005 soaring to 150kg from 105kg in 2000. With the growing popularity of light-weight vehicles, the consumption of automotive plastics is expected to see high rise.

Thus far, China has become the largest automotive producer in the world over thirty years' development, with the sales volume in 2009 And 2010 ranking the global first consecutively. The robust automobile market drives the progression of automotive plastic parts industry; and the average application of plastics for mid-grade sedan car approximates 130kg/unit. In 2010, Chinese passenger car plastic parts market size reached around RMB58.2 billion and the figure will hit RMB85.12 billion in 2015.

There are numerous manufacturers of automotive plastic parts in China, so it exist cut-throat competition and complicated relations. According to supply relationship, these manufacturers can be broadly classified as the first-tier suppliers and the second-tier suppliers.

The first-tier supplier mainly refers to foreign-funded enterprises and joint ventures which directly provide supporting service for complete vehicle manufacturers. Most of first-tier suppliers specialize in some field, with stable supply relationship. Taking Germany-based Behr for example, it established SBTS and DBTS as its branches primarily focused on the production of heat exchange system and related plastics parts, with major customers including Shanghai Automotive and Dongfeng Automotive.

The second-tier supplier mainly refers to domestic enterprises which largely offer supporting service for the first-tier supplier and seldom directly face to complete vehicle manufacturers. The second-tier suppliers are mainly involved in the manufacture of automotive plastic parts such as bumper and dashboard. A case in point is Century Huatong, the products of which cover many fields like heat exchange system plastic parts, internal & external decoration plastic parts, air-conditioning system plastic parts, car lamp system plastic parts, safety system plastic parts, with major customers being the first-tier suppliers such as SBTS, Yanfeng Visteon, Shanghai Koito and Shanghai Delphi.

## Some Chinese Manufacturers of Auto Plastic Parts and Their Customers

	Enterprises	Major Products	Major Customers
<b>First-Tier Supplier</b>	SBTS	heat exchange system plastic parts	SVW, SGM, SAIC, etc.
	DBTS	heat exchange system plastic parts	DFAC, Dongfeng Nissan, etc.
	Shanghai Koito	car lamp system plastic parts	SVW, SGM, SAIC, etc.
	NBHX	internal & external decoration plastic parts	SVW, FAW-VK, FAURECIA, etc.
	.....	.....	.....
<b>Second-Tier Supplier</b>	Century Huatong	heat exchange system plastic parts, internal & external decoration plastic parts, air-conditioning system plastic parts, car lamp system plastic parts, safety system plastic parts	SBTS, Yanfeng Visteon, Shanghai Koito, Shanghai Delphi, etc.
	Shuanglin	seat system parts, auto air-conditioning system parts	Brose, FAURECIA, VALEO, SBTS
	.....	.....	.....

Presently, Sino-foreign joint ventures are still the most competitive leaders among China-based manufacturers of automotive plastics parts. Meanwhile, domestic-funded enterprises are speeding up their space for further development. In particular, NBHX has grown into a first-tier automotive parts supplier. Moreover, enterprises like JNMPT, Shuanglin and Shunrong are committing to expand their first-tier mating business, expecting to see huge potential.

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