



Global and China Automotive Exhaust System Industry Report, 2010-2011

Oct. 2011

This report

- ◆ **Analyzes the global and China automotive exhaust system industry**
- ◆ **Focuses on the automotive exhaust system manufacturers**
- ◆ **Highlights the operation of Ceramic Monolith and DPF Manufacturers and catalyst manufacturers.**

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Abstract

Automotive Exhaust System, also known as Emissions Control System, is the system that collects and emits exhaust gas, generally consisting of exhaust manifold, down pipe, catalytic converter & DPF, oxygen sensor, muffler and carbon canister. Automotive Exhaust System discharges the exhaust gas generated by running engines, and reduces pollution and noise.

In 2009, an exhaust system for gasoline-driven vehicle was priced at USD250 on average. As the environmental policy becomes increasingly harsh, the price will rise to USD280 in 2014. An exhaust system for diesel-driven vehicle was as expensive as USD350 in 2009, and the price will be USD530 in 2014.

On July 1, 2011, China began to implement national IV standards for light-duty gasoline-driven vehicles. The average price of Exhaust System rose to USD240. China had planned to implement the standards for diesel-driven vehicles since January 1, 2012, but the quality of Chinese diesel is not good, so China is very likely to delay the implementation of the national IV standards for diesel-driven vehicles. In 2015, China will upgrade the emission standards for gasoline-driven vehicles once again.

Ranking of Major Automotive Exhaust System Manufacturers by Revenue in the World, 2010-2011 (USD mln)

	2010	2011E
Faurecia	6489	7559
Tenneco	3507	4358
Eberspächer	2120	2365
Sango	1788	1851
Futaba	1730	1738
Benteler	1063	1138
Boysen	1084	1198
Yutaka	1788	1708
Sejong	708	758
Bosal	550	628
Katcon	526	530
Tokyo Roki	510	508
Others	3932	4563

Faurecia is a global leading automotive exhaust system manufacturer controlled by French PSA Group. At the end of 2009, Faurecia acquired EMCON of Arvin Industries with about EUR330 million, becoming the world's largest automotive exhaust system manufacturer. EMCON is a major supplier of FORD and BMW, while Faurecia a major supplier of VW and PSA, so the customer base of Faurecia is the strongest among all of automotive exhaust system companies.

Tenneco is a U.S. company, and it acquired German Gillet in 1994. Gillet's Walker is the world's first automotive exhaust system manufacturer, established in 1888. Eberspacher is a German family enterprise, and over 70% of its revenue comes from Europe, it has not entered the Asia-Pacific market.

Sango and Futaba are Japanese companies, and their major client is Toyota. Benteler and Boysen are German family enterprises, starting from steel tube business. Yutaka is a subsidiary of Honda. Sejong is a South Korean company, and 85% of its revenue comes from Hyundai.

Bosal is a Belgian company, and it was a former partner of Delphi. Katcon is a company in Mexico, and it acquired Delphi's Exhaust System Division in 2009. Tokyo Roki's major customers are Mazda and ISUZU. Calsonic Kansei is controlled by Nissan.

The key component of automotive exhaust system is three-way catalytic converter. The automotive catalyst market is mainly controlled by four companies, namely, Johnson Matthey, Umicore, BASF and Cataler. In 2010, Johnson Matthey, Umicore and BASF achieved revenue of over EUR10 billion respectively, but the catalyst revenue accounted for a small proportion of the total revenue. Only Toyota's Cataler is mainly engaged in the production of automotive catalyst.

There are many M & A cases in the field of catalyst, and many companies have changed hands for several times. Umicore is a Belgian mining giant, and it is also a leader in the fields of lithium battery anode material manufacturing and precious metal recycling, and it acquired the catalyst business of Delphi and Degussa. BASF acquired the automotive catalyst business of Engelhard. Johnson Matthey acquired German Argillon to enhance its technical strength with EUR214 million in February 2008.

The market of ceramic monoliths for automotive exhaust system is basically monopolized by Corning and NGK.

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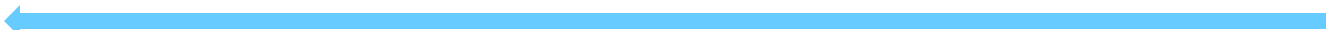
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