



Global and China Automotive Wheel Hub Industry Report, 2011-2012

Mar. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Ministry of Industry and Information Technology of PRC and CAAM etc.

Abstract

Global and China Automotive Wheel Hub Industry Report, 2011-2012 covers the followings:

- Global and Chinese Automotive Market
- Global and Chinese Wheel Hub Industry
- Research on 31 Major Wheel Hub Manufacturers Worldwide
- Research on 5 Major Steel Wheel Hub Manufacturers in China

In China, aluminum wheel hub manufacturers can be divided into two categories, aftermarket-oriented, mainly referring to small- and medium-sized producers, and OEM market-oriented, chiefly large-sized ones. Aftermarket consists of domestic and foreign types, there are numerous small-sized manufacturers targeting the former, about 80-100, each with annual output of less than 10,000 units; while manufacturers aimed at foreign aftermarket are mainly concentrated in Zhejiang, Guangdong and Jiangsu, numbering up to 3,000, including 700-900 active ones.

2011 is a year of harvest for Chinese aluminum wheel hub manufacturers, whose main export destinations were United States, Russia, Germany and the UAE, of which, the U.S. market occupied around half of total shares. The U.S. automobile industry saw strong recovery, particularly pickup, light truck and heavy truck, which required large diameter wheel hubs with unit price 2-3 times higher than that of passenger cars. In 2011, the wheel export of China reached US\$4.382 billion, breaking through US\$4 billion for the first time, of which, aluminum wheels climbed 24.8% to US\$3.886 billion, and steel wheels US\$696 million with a 40% rise, both setting new records.

The soaring oil price drives recovery of economic situations in Russia and the Middle East, as well as boosts aluminum wheel hub aftermarket, especially Russia, the main export destination of small- and medium-sized aluminum wheel hub firms in Zhejiang province, China. Despite Chinese automotive market was sluggish in 2011, the luxury car market boomed and witnessed the substantially increased export of aluminum wheel hubs to Germany. Although EU charged anti-dumping duties on aluminum wheel hub made in China, Chinese companies were still competitive. CITIC Dicastal, mainly dealing with exports to Germany, realized export value of US\$417 million in 2011, a rise of 20.9% from US\$345 million in 2010.

Relying on port advantages, Lianyungang has been centered around a batch of aluminum wheel hub enterprises, led by Alink Wheel (LYG), which supplies Hyundai Motor's base in Yancheng city, and launches vigorous export to the U.S.; in 2011, it became China's second largest aluminum wheel hub manufacturer with revenue growth of 76%.

Binzhou Movever Dicastal Hub Co., Ltd., principally aiming at German aftermarket, also witnessed a significant rise in performance, up as high as 173%.

The robust export market fuels Chinese manufacturers to carry capacity expansion successively, and a great number of aluminum wheel hub projects are being prepared to be constructed. Larger expansions refer to Shanghai Mingqi Aluminum Industry's 10 million units/a Project in Yizheng, Jiangsu, Jinfei Machinery's 5.4 million units/a Project in Inner Mongolia, Beijing East Asia Aluminum Industry's 10 million units/a Project in Hohhot, Inner Mongolia, the 2 million units/a Project in Yihuang, Jiangxi, and the 5 million units/a Project in Yuncheng, Shanxi.

According to incomplete statistics, there are approximately 50 aluminum wheel hub projects under construction, and the new annual capacity by end-2013 will approach 100 million units. Presently, the total size of global market currently is less than 300 million units, which is out of question severe overcapacity.

China's huge exports also aroused strong discontent from U.S. companies. The latter has initiated anti-dumping on Chinese steel wheel hubs, and on aluminum wheel hubs, just a matter of time; so has India. For Chinese enterprises, export market is still the best choice, for the impossibility to enter the OEM market, plus the extremely high cost of domestic aftermarket.

Big events in the automotive wheel industry in 2011 included Brazil-based lochpe-Maxion's acquisition of Hayes Lemmerz, the world's largest wheel company, with US\$725 million in cash. lochpe-Maxion itself boasts annual capacity of 26 million units of wheels, combined with Hayes Lemmerz's, totaling up to 90 million units, containing 75 million steel wheels and 15 million aluminum wheels. At the end of 2011, Unison Capital, a Japanese private equity firm, projected JPY23.9 billion (about US\$310 million) to purchase Asahi Tec.

Top 24 Aluminum Alloy Wheel Hub Manufacturers

Worldwide, 2010-2011

Unit: US\$M	2010	2011
RONAL	864	1,041
CITIC DICASTAL	733	933
CMW	1,160	930
SII	720	822
ROBRET	740	810
ENKEI	880	680
Hayes Lemmerz	551	678
ALCOA	510	588
Lioho Machinery	506	485
UNIWHEEL	388	480
ALINK	.....	.....
LIZHONG	.....	.....
Sheng Wang Auto Parts	.....	.....
Jinfei Machinery	.....	.....
Ningbo Baody Autoparts	.....	.....
Kosei Aluminum	.....	.....
Foshan Nanhai Zhongnan Aluminium Wheel	.....	.....
Binzhou Movever Dicastal Hub	.....	.....
Shanghai Mingqi Aluminum	.....	.....
FuCheng Aluminum	.....	.....
YUELING	.....	.....
YHI	.....	.....
KWC	.....	.....
Shenyang Dooray Wheel	.....	.....

source: Global and China Automotive Wheel Hub Industry Report, 2011-2012

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