



China Automotive Windshield Wiper Industry Report, 2011-2012

Apr. 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 NBS(National Bureau of Statistics of China), and CAAM etc.

Abstract

The increasing output and ownership of passenger cars pushed up China's demand for windshield wiper by 17% to 150 million in 2011. Meanwhile, the application of rain-sensing windshield wipers for passenger cars in China increased 1.6 percentage points year on year to 9.6% in 2011.

As opposed to 2010, China's automotive windshield wiper market witnessed two major changes in 2011.

➤ OEM market concentration increased: the combined market share of top 4 manufacturers in China's automotive windshield wiper OEM market realized 56%, an increase of 4 percentage points over 2010;

➤ Aftermarket concentration decreased: due to relatively low technology threshold, small and medium windshield wiper manufacturers developed rapidly. In 2011, the share of top 10 manufacturers in China's automotive windshield wiper aftermarket declined 3.5 percentage points over 2010.

Although there are a large number of enterprises engaged in the production of automotive windshield wipers in China, foreign enterprises still hold a dominant position. In particular, Valeo and BOSCH are the market leaders, with the market share topping the list in OEM market and aftermarket in 2010-2011, respectively.

For Valeo, there are four major windshield wiper brands, namely, Valeo, Marchal, PJ and SWF. In late 2011, it successfully developed the new generation windshield wiper system - AquaBlade which acceded to the market in 2012. Valeo has two windshield wiper production bases in Shanghai and Taizhou, Zhejiang province. The Shanghai base specializes in the production of windshield wiper motor and windshield wiper assembly, while the Taizhou base is mainly engaged in the production of wiper blades and scrubbers. In 2011, the Taizhou production base expanded its capacity to produce the components of windshield washer system.

The windshield wiper products of BOSCH mainly include 4 series, including Huoyi, Fengyi, Twin and Aero Twin. In particular, Huoyi, Fengyi and Aero Twin are hit products in Chinese market. BOSCH also has 2 windshield wiper production bases in Changsha of Hunan and RuiAn of Zhejiang. And the former specializes in producing windshield wiper motor, while the latter are mainly engaged in windshield wiper assembly.

The report highlights the following aspects:

- ④ Demand for front/rear windshield wiper in China; OEM Status of rain-sensing windshield wiper; outlook for 2015;
- ④ Import & export;
- ④ Profitability;
- ④ Brands and market occupancy;
- ④ Development of major domestic and foreign windshield wiper manufacturers, including operation, output, sales volume, major products, major customers, etc.

It is in the report that covers the followings:

- ▶ The status quo, supply & demand and development trend of Chinese low and medium-voltage inverter industry;
- ▶ The development environment, market size, brand and channel competition of low and medium-voltage inverter industry;
- ▶ Highlighting the downstream application sectors of low and medium-voltage industry and analyzing the development of inverters for lifting machinery, elevator, machine tool, rail transit and home appliances;
- ▶ Analyzing the operation, project planning and forecast of 15 low and medium-voltage inverter manufacturers in China.

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