



Global and China Automotive Thermal System Industry Report, 2011-2012

Sept. 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 China Association of Automobile Manufacturers, National Bureau of Statistics of China and WIND Database etc.

Abstract

Global and China Automotive Thermal System Industry Report, 2011-2012 highlights the followings:

1. Introduction to automotive thermal system
2. Global and Chinese automotive market
3. Automotive thermal system market and industry in China and beyond
4. 14 major automotive thermal system companies

Automotive thermal system mainly consists of four parts, namely, compressor, HVAC, powertrain cooling and fluid transport. The former three ones serve as the major components and comprise 85% of the entire automotive thermal system value.

The compressor falls into four categories, including pure electric compressor, variable swashplate compressor, rotary suction swashplate compressor and fixed scroll compressor.

HVAC, which can be seen on the dashboard, features small size, less noise and high efficiency. It mainly includes air filter, blower fan, evaporator and heater core.

Powertrain cooling system covers radiator, condenser, charge air cooler and integral oil cooler.

The global market size of automotive thermal system approximates USD36 billion in 2012. Since the automotive thermal system is quite mature, its market size usually changes with the automotive output.

Revenue of Major Global Thermal System Manufacturers, 2010-2012E (Unit: US\$M)

	2010	2011	2012E
Visteon	3,614	4,403	4,560
Halla	2,658	3,008	3,226
Denso	10,883	11,847	14,809
Behr	4,440	5,003	5,396
VALEO	3,888	4,239	4,488
Delphi	1,603	1,755	1,636
Calsonic	1,180	1,230	1,380
Keihin	768	696	856

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The compressor is a high-tech component in the automotive thermal system, and most of the technologies for global automotive thermal system compressor are contributed by Japan. Japan-based Toyota Industries and Sanden are the world's largest manufacturers of automotive air conditioning compressor, and Toyota Industries makes up over 30% market share. Chinese enterprises principally focus on aftermarket, and China thus becomes the biggest producer of automotive air conditioning compressor for maintenance, featuring large output, low unit price and meager profit. A compressor made by Toyota Industries is priced at around USD120.6 on average, while one compressor made by Aotecar, the largest producer of automotive air conditioning compressor in China, was averagely sold at USD63 in 2011.

Valeo derives automotive air conditioning technology from Zexel, a Japanese company acquired by Valeo in 2003. And German Behr cooperates with Sanden to make up for its disadvantage in compressor field.

Visteon, a controlling company of Halla, relies on Halla and secures more than 60% of automotive thermal system orders from Hyundai and Ford. Denso, a former subsidiary of Toyota, not only wins over 80% of automotive thermal system orders from Toyota, but obtains the automotive thermal system business orders from GM, Chrysler, Honda, Suzuki and Mazda, and ascends to the No. 1 position worldwide.

1 Global and Chinese Automotive Market

- 1.1 Global Automotive Market
- 1.2 Industrial Pattern

2. Chinese Automotive Market

- 2.1 Overview
- 2.2 Recent Developments
- 2.3 Passenger Car Market
- 2.4 Commercial Vehicle Market
- 2.5 Industrial Pattern

3 Automotive Thermal System Industry

- 3.1 Introduction to Automotive Thermal System
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- 3.3 Market Share of Automotive Thermal System Manufacturers
- 3.4 Automotive Thermal System Industry in China
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 - 3.4.2 Condenser market
 - 3.4.3 Heater Core Market
- 3.5 Global Automotive Air Conditioning Compressor Industry
- 3.6 Automotive Air Conditioning Compressor Industry in China
 - 3.6.1 Commercial Vehicle Air Conditioning Market
 - 3.6.2 Commercial Vehicle Air Conditioning Industry

4 Major Thermal System Companies

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- 4.1.1 Halla

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- 4.13 Keihin
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