



Global and China Automotive Exhaust System Industry Report, 2012

Oct. 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 China Association of Automobile Manufacturers, and National Bureau of Statistics of China etc.

Abstract

Automotive exhaust system belongs to relatively mature industry. The market size of the industry is expected to reach USD31,329 million in 2012, slightly increasing by 2.8% compared with USD30,486 million in 2011; the figure will attain USD33,250 million in 2013.

Ranking of Major Automotive Exhaust System Players by Revenue in the World, 2010-2012 (USD mln)

	2010	2011	2012E
FAURECIA	6,489	8,074	8,078
TENNECO	3,507	4,755	5,138
Eberspächer	2,120	2,977	3,236
Sango	1,788	1,751	1,802
Futuba	1,730	2,093	2,188
Benteler	1,063	1,138	1,006
Boysen	1,084	1,307	1,502
Yutaka	1,788	1,608	1,619
Sejong	708	758	861
Bosal	550	608	563
Katcon	526	502	550
Tokyo Roki	510	452	466

In 2012, the much-anticipated China automotive exhaust system market fell through again. As early as Dec.21st 2010, Ministry of Environmental Protection has announced to delay the implementation time of national IV standards for diesel-driven vehicles above 3.5 tons by one year. However, it further postponed to the implementation to 2012 in 2011, and when 2012 came, the implementation was further put off to 2013.

Ministry of Environmental Protection announced on Aug.1st 2012 that, gasoline heavy duty vehicles will formally execute national IV emission standards from Jul.1st 2013. However, as early as 2009, the government has released standard concerning automobile diesel fuels, which regulated that the diesel conforming to national III standard (350ppm sulfur content) should be supplied nationwide from Jul.1st 2011, but the domestic gasoline companies failed to achieve comprehensive supply up to now. On the other side, the national IV vehicle diesel standard (50ppm sulfur content) has not been officially released yet. Consequently, Ministry of Environmental Protection postponed the implementation schedule of national IV emission standard for heavy duty diesel-driven vehicles by one and half years to Jul.1st 2013.

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The key block for the implementation of new standards is that petroleum enterprises in China fail to reach the comprehensive supply of vehicle diesel fuels conforming to national IV standards, and the new standards are expected to be carried out by the end of 2013.

The stable recovery of American economy also stimulates the strong development of automotive industry in USA, especially the light truck and commercial vehicle. Obama Administration issued the final version of Corporate Average Fuel Economy (CAFE) Regulation of 2025 on Aug.28th 2012, which announced the transformation of the draft unveiled in 2011 into formal regulations and provisions, making American automotive exhaust system market lead the world in future several years.

The strong demand of Chinese market on top grade automobiles also pulls the German automotive industry, which in turn benefits the exhaust system enterprises in Germany. Eberspacher and Boysen are the leading automotive exhaust system players in Germany. Benteler mainly engages in the production of steel tubes, and the revenue from automotive exhaust system declined somewhat. Faurecia was encumbered by its biggest client PSA, but German market made up the negative effect brought by the decline

The Japanese enterprises actively capture the American market, and the revenue from American clients grew rapidly, which offset the decline of local clients in Japan.

Global and China Automotive Exhaust System Industry Report,

2012 involves the following contents:

- Global and China Automotive Market
- Global and China Automotive Industry
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- Global and China Automotive Exhaust System Industry
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- Ceramic carrier and DPF manufacturers
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