



Global and China Automotive Wheel Industry Report, 2012-2013

Apr. 2013

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

The report highlights the followings:

1. Global Automotive Market
2. China Automotive Market
3. Global Automotive Wheel Market and Industry
4. China Automotive Wheel Market and Industry
5. 32 Aluminum Wheel Makers and 5 Steel Wheel Makers

In 2012, the world's PLT output hit 67.6 million, with the popularity rate of aluminum wheel as high as 66%. The estimate suggests that the world's PLT output in 2013 will register 68.9 million with the penetration rate of aluminum wheel soaring to 67%. In 2012, OEM aluminum wheel shipment approximated 185 million, and the shipment of AM aluminum wheel reached 21 million pcs. In 2012, the world's aluminum wheel market scale approached around USD12.9 billion, while the targeted figure in 2013 will increase to USD13.7 billion.

At the end of 2012, China's aluminum wheel capacity approached 180 million pcs, while the sales volume surpassed 120 million pcs, with the capacity utilization above 70%. In particular, some 45 million pcs were sold in domestic market, while the rest 75 million ones were exported to overseas markets.

In 2011-2012, the Chinese market witnessed severe overcapacity of both alumina and electrolytic aluminum, leading to a nosedive of alumina price. In order to dissolve capacities, a great many of alumina enterprises tapped into the aluminum wheel market successively, causing oversupply and cut-throat competition in the market. Consequently, the profits of SMEs fell sharply. By contrast, large industrial players expand market further relying on their scale advantage and improve qualities of top-grade products. A case in point was CITIC Dicastal Wheel Manufacturing, the wheel output of which hit 27 million pcs in 2012, with the revenue substantially rising by 27.8% from the preceding year, despite the slight output growth of 12.5% against the 24 million ones over 2011.

Due to the staggering economic recovery in Europe, industrial players in these countries saw steep dive in profit and slight drop in revenue. As for Japanese and North American counterparts, their profits were basically flat or on a slight decline.

Revenue of World's Top 25 Automotive Wheel Companies, 2011-2012 (USD mln)

(USD mln)	2011	2012
Iochepe-Maxion	308	2,050
DICASTAL	1,243	1,589
CMW	1,330	1,210
ENKEI	1,280	1,176
RONAL	1,010	903
SII	822	821
ROBRET	918	757
Zhengxing	637	592
Iochepe-Maxion (Aluminum Wheel)		567
ALCOA	508	520
Accuride	407	414
Lioho Machinery	485	408
UNIWHEEL	466	411
LIZHONG	294	373
WANFENG AUTO WHEEL	327	356
Shengwang AutoParts	280	329
JINFEI	249	308
Changchun Faway Automobile Components	320	298
ALINK	283	226
Dongfeng Automotive Wheel	204	214
Ningbo Baodi	203	210
Xingmin Wheel	233	180
Yueling Wheel	133	153
Zhejiang Jingu	120	132
YHI	128	117

Source: ResearchinChina Global and China Automotive Wheel Industry Report, 2012-2013

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1. Global Automotive Market

- 1.1 Global Automotive Industry
- 1.3 Global Automotive Market

2. China Automotive Market

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- 2.3 Commercial Vehicle Market
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3. Global and China Wheel Market

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