



Global and China Automotive Wheel Industry Report, 2013-2014

May 2014

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 analyzes the following aspects:

- ✘ Global automotive market
- ✘ Chinese automotive market
- ✘ Global automotive wheel industry and market
- ✘ Chinese automotive wheel industry and market
- ✘ 37 automotive wheel makers

In 2013, aluminum wheel makers were satisfied to see the continuous falling upstream raw material prices and recovered downstream markets. Due to the excess capacity, the primary aluminum price declined more than 15% in China in 2013. The global primary aluminum price fell about 13%. As for downstream markets, Japan and the U.S. rebounded, the European market just went out of the bottom, while Russia witnessed decline.

In 2014, China's primary aluminum price is still facing great pressure, but the decline rate is lower than that in 2013. On the international market, the primary aluminum price stops falling to show a stable trend.

Ranking of Global Top 25 Wheel Companies by Revenue, 2011-2013 (USD mln)

	2011	2012	2013
Iochpe-Maxion	308	2,050	2,167
DICASTAL	1,243	1,589	1,658
CMW	1,630	1,810	1,939
ENKEI	1,280	1,176	1,208
RONAL	1,010	873	820
SII	822	821	790
ROBRET	1,008	1,105	1,120
Zhengxing	637	592	628
ALCOA	1,010	955	1,015
Accuride	407	414	364
Lioho Machinery	485	408	370
UNIWHEEL	466	411	450
LIZHONG	294	373	435
WANFENG AUTO WHEEL	327	356	400
Shengwang AutoParts	280	329	352
Jinfei Machinery	249	308	291
Changchun FAWAY	120	128	117
Dongfeng Automotive Wheel	196	166	194
Ningbo Baodi	103	120	130
Xingmin Wheel	233	180	207
Yueling	133	128	136
Jingu Wheel	120	132	188
YHI	128	117	108
KWC	160	150	148
DONGWHA	230	210	213

Source: Global and China Automotive Wheel Industry Report, 2013-2014

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China aluminum wheel industry performs stably. Although there are many aluminum wheel investment projects, most of them do not go into operation actually after loans are offered; therefore, the expected aluminum wheel overcapacity does not occur. In China aluminum wheel industry, large enterprises target the OEM market while SMEs focus on the AM market.

As the global leading position is strengthened, CITIC Dicastal continues to expand its market share in the conservative Japanese supply chain system with strong competitive advantages. Impact by CITIC Dicastal, the revenue of GAC CHUO SEIKI Component, a major supplier of GAC Toyota, dropped from RMB1.252 billion in 2012 to RMB603 million in 2013. CITIC Dicastal added Ningbo base to seize more market share. Lizhong Wheel also performed well in 2013, it surpassed Wanfeng Auto Wheel to become China's second largest maker of automotive aluminum wheels, and it has opened up the Thailand OEM market with huge development potentials.

SMEs still keep an eye on the AM export market, and about 110 ones of them rely on export. Top 30 SMEs realize the average export value of USD30-50 million, and mainly export products to the United States, Russia, Europe and the Middle East.

Except CITIC Dicastal, Chinese aluminum wheel enterprises still highlight the field of low-end products, for example, Lizhong Wheel offers the average unit price of about USD36 and CITIC Dicastal USD55, lower than USD66 offered by the U.S. Superior Industries International and ALCOA's over USD100.

In the field of steel wheels, the upstream raw material prices remain stable while the aluminum price keeps descending, which weakens the advantages of low-cost steel wheels; therefore, steel wheel makers have to sacrifice gross margin to stabilize customers. Under this context, China's largest steel wheel maker ----- Zhengxing Wheel saw its gross margin dip from 25.2% in 2012 to 20.8 % in 2013. Meanwhile, the sluggish Chinese commercial vehicle market restricts the development of steel wheels, so small companies gradually suspend or reduce production, which leads to a higher market concentration degree.

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