



China Automotive Air-conditioning Compressor Industry Report, 2014-2017

Jun. 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

Benefiting from the rise in automobile production and sales, the growing car ownership as well as higher requirements of consumers on vehicle comfort, the automotive air-conditioning market shows rapid development. In 2013, China's automotive air-conditioner output hit 23.41 million units, up 14.9% year on year, with the CAGR of 22.5% in 2007-2013; meanwhile, Chinese automotive air-conditioning market size jumped by 13.8% year on year to RMB13.93 billion with the CAGR of 22.0% during 2007-2013.

In China, automotive air-conditioning compressors are mainly divided into swash plate, rotary vane and scroll types. The low-cost and high-efficient swash plate compressors are favored by the majority of automotive air-conditioning system suppliers, enjoying about 70% market share; rotary vane compressors are mainly used for small engine vehicle, including micro, small and compact sedans and minibuses, accounting for roughly 10% market share; while scroll compressors, compared with the above two types, are featured with higher efficiency and lower costs, but stricter requirements on operating conditions, so such compressors are commonly installed in small engine sedans and minibuses, occupying about 20% market share.

There exist two kinds of suppliers -- supporting suppliers and independent suppliers in Chinese automotive air-conditioning compressor market, wherein, the former embraces some international

brands mastering 70% market share together, such as Sanden, Denso, Halla, Dongguan Keihin; independent suppliers seize 30% market share jointly, including AoteCar, Chongqing Jianshe Automotive Air Conditioner and Panasonic and other companies.

The report mainly conducts the following studies:

- ✘ Definition, classification, policies, regulations as well as technical development trends of China automotive air-conditioning compressor industry;
- ✘ The downstream of China automotive air-conditioning compressor industry -- the automotive industry, including passenger cars, buses and other market segments;
- ✘ Market size, competition pattern, market supporting, and future development trends of China automotive air-conditioning compressor industry;
- ✘ Status quo and future development trends of major Chinese automotive air-conditioning compressor market segments, including swash plate, rotary vane and scroll types;
- ✘ Profile, financial data, hit products, technical characteristics, R & D, marketing, investment projects in China as well as base distribution of 14 companies such as Sanden, Nanjing AoteCar, Denso, Valeo, Panasonic, Dongguan Keihin, Chongqing Jianshe and Mudanjiang Futong.

Major Automotive Air-conditioning Compressor Suppliers and Supporting Automobile Companies in China

Compressor Suppliers	Supporting Automobile Companies
Sanden	Shanghai Volkswagen, FAW-Volkswagen, Shanghai GM, Great Wall Motor, Dongfeng Peugeot Citroen Automobile, Chery Automobile, etc.
Denso	FAW Toyota, Shanghai Volkswagen, FAW Volkswagen, GAC Honda, Dongfeng Honda, Beijing Benz, etc.
Halla Visteon	Hyundai Motor, Kia Motors, Geely Automobile, etc.
Valeo	FAW Group (FAW Xiali, FAW Haima), Dongfeng Nissan, Beijing Benz, Renault Samsung, Daimler, Chery, BMW Brilliance, Zhengzhou Nissan, Soueast Motor, Aeolus Automobile, etc.
Chongqing Jianshe Automomotive Air Conditioner	Changan Automobile, Changan Suzuki, Changan Ford, Chery Automobile, Changhe Automobile, FAW Group Corporation (FAW Xiali, FAW Haima), etc.
Shanghai Velle	Geely Automobile, etc.
Dongguan Keihin	Dongfeng Honda, GAC Honda, etc.
Mudanjiang Futong	FAW-Volkswagen, FAW Group Corporation (FAW Xiali, FAW Haima), Zhonghua Sedan, Brilliance Jinbei, Chery, JMC, etc.

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