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 microbuses, 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 Automomotive 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.
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<th>Compressor Suppliers</th>
<th>Supporting Automobile Companies</th>
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<td>Sanden</td>
<td>Shanghai Volkswagen, FAW-Volkswagen, Shanghai GM, Great Wall Motor, Dongfeng Peugeot Citroen</td>
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<tr>
<td></td>
<td>Automobile, Chery Automobile, etc.</td>
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<td>Denso</td>
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<td>Halla Visteon</td>
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<tr>
<td>Valeo</td>
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<td></td>
<td>BMW Brilliance, Zhengzhou Nissan, Soueast Motor, Aeolus Automobile, etc.</td>
</tr>
<tr>
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<tr>
<td>Automotove Air</td>
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<tr>
<td>Conditioner</td>
<td></td>
</tr>
<tr>
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</tr>
<tr>
<td>Dongguan Keihin</td>
<td>Dongfeng Honda, GAC Honda, etc.</td>
</tr>
<tr>
<td>Mudanjiang Futong</td>
<td>FAW-Volkswagen, FAW Group Corporation (FAW Xiali, FAW Haima), Zhonghua Sedan, Brilliance Jinbei,</td>
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<td>Chery, JMC, etc.</td>
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*Source: ResearchInChina*
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