



# **China Automotive Bumper Industry Report, 2014-2017**

**Aug. 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

A bumper, which is attached to the vehicle's front-most and rear-most ends, is a safety device designed to absorb or alleviate impact in a collision and protect the vehicle's front and rear ends. In appearance, it is designed to avoid the impact of the vehicle's external damage on the safety system, but indeed this design is increasingly being used to protect pedestrians.

Bumpers, one of easily delicate products, mainly involve the new car supporting market (OEM) and after-sales replacement market. And the former is determined by the output of new cars while the latter is directly proportional to the car ownership. Thanks to a drastic increase in the output and ownership of the vehicles, the market capacity of bumpers in China reached 56.24 million pieces, up 14.5% from a year earlier.

China boasts a large base and rapid growth in automobile production, and foreign corporations are accelerating their layout in China. At present, foreign bumper manufacturers in China primarily consist of Plastic Omnium, Faurecia, Magna International Inc., Hyundai Mobis, Futaba, Hanil E-Hwa, and Metalsa, etc., of which Plastic Omnium occupies the largest market share in the Chinese bumper market.

In 2013, Plastic Omnium posted EUR5.125 billion in revenue and EUR208 million in net income, up 6.6% and 14.9%, respectively, year on year, with net profit margin of 4.1%. In 2013, the company realized the revenue of EUR540 million in China, and by 2018 this figure is expected to climb to at least EUR1 billion. As of the end of 2013, the company's bumpers had been manufactured by two of its subsidiaries --Yanfeng Plastic Omnium Automotive Exterior Systems Co., Ltd. (a joint venture) and Plastic Omnium Composite Materials (Jiangsu) Co., Ltd. (wholly-owned).

In 2013, Yanfeng Plastic Omnium Automotive Exterior Systems Co. sold as many as 3.37 million bumpers, an increase of 42.8% on a year-on-year basis. And the revenue amounted to RMB3.109 billion, up 22.4% from the previous year. Additionally, the company established subsidiaries and branches in the cities like Shanghai, Shenyang, Nanjing, Chongqing, Chengdu, and Guangzhou. And the major supported customers by company's bumpers included Shanghai Volkswagen, Shanghai GM, FAW Volkswagen, Brilliance BMW, Mazda, Volvo, Ford, Suzuki, and Geely, etc.

China Automotive Bumper Industry Report, 2014-2017 by ResearchInChina primarily deals with the followings:

- ➔ Overview of automotive bumper industry in China (including definition, classification, the materials used, the industry's business model, the manufacturers' regional distribution, and development trend, etc.);
- ➔ Operation of the assembled vehicle industry in China (including the revenue and variation trend in profit in auto industry, the output and sales volume of assembled vehicles, passenger vehicles and commercial vehicles, as well as the output and sales volume, etc. of major manufacturers.);
- ➔ China's automotive bumper market (including market situation, market capacity, supply for vehicle manufacturers, competitive landscape, and import & export, etc.);
- ➔ Major global bumper manufacturers (including their shareholding structure, revenue, revenue structure, net income, investment, R&D, supply for vehicle manufacturers, and latest developments, as well as their related subsidiaries in China, etc.);
- ➔ Major bumper manufacturers in China (including the shareholding structure, revenue, revenue structure, net income, investment, R&D, supply for vehicle manufacturers, and latest projects, etc. of these companies and their subsidiaries).

### Major Foreign Bumper Manufacturers in China, as of 2013

Foreign Enterprises	Time	Subsidiaries	Registered Capital	Shareholding Ratio	Location (Headquarters)
Plastic Omnium	Mar-06	Plastic Omnium Composite Materials (Jiangsu) Co., Ltd.	USD10.00 mln	100%	Wuxi, Jiangsu
	Mar-07	Yanfeng Plastic Omnium Automotive Exterior Systems Co., Ltd.	RMB503.50 mln	49.95%	Shanghai
Magna International Inc.	Sep-04	MCC Wuhu Exteriors	USD23.20 mln	51%	Wuhu, Anhui
	Dec-13	Magna Guangneng Automotive Trim System (Hangzhou) Co., Ltd.	RMB25.00 mln	50%	Hangzhou, Zhejiang
Faurecia	Dec-10	Zhejiang Faurecia Limin Interior & Exterior Systems Co., Ltd.	RMB68.00 mln	50%	Ningbo, Zhejiang
	Jun-11	Changchun Huaxiang Faurecia Automotive Plastic Components	RMB120.00 mln	50%	Changchun, Jilin
Futaba Industrial Co., Ltd.	Jan-12	Chngsha Futaba Auto Parts Co., Ltd.	USD12.50 mln	100%	Changsha, Hunan
Hyundai Mobis Co., Ltd.	Nov-02	Beijing Hyundai Mobis Automotive Parts Co., Ltd	USD72.00 mln	100%	Beijing
	Sep-02	Beijing Mobis Chonche Automotive Parts Co., Ltd.	USD7.40 mln	60%	Beijing
Hanil E-Hwa Co., Ltd.	Jun-02	Jiangsu Hanil Auto Plastic Parts Co., Ltd.	USD25.00 mln	19%	Yancheng, Jiangsu
Metalsa	Mar-96	Shanghai Metalsa Auto Components Co., Ltd.	EUR2.13 mln	60%	Shanghai

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##### 1.1.1 Definition

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