



China End-of-Life Vehicle (ELV) and Dismantling Industry Report, 2014-2017

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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.

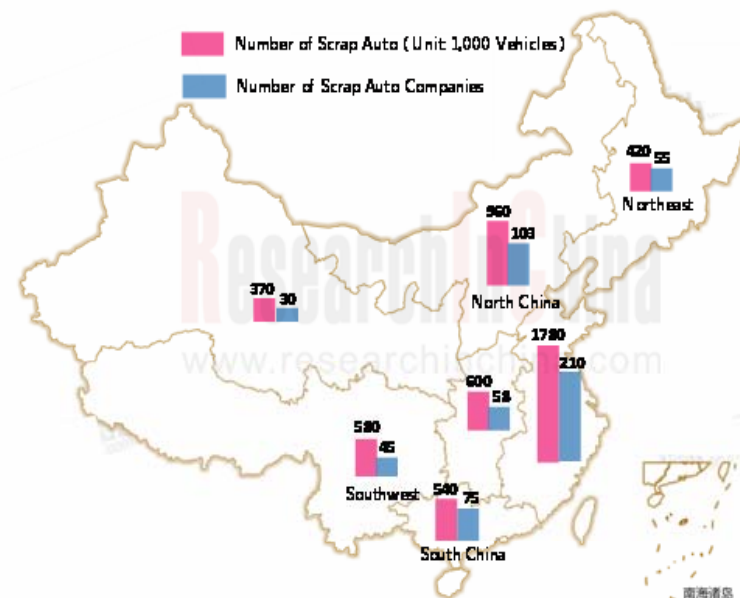
Abstract

China's automobile industry has ushered in an explosive growth since 2000, with car ownership rising to 137 million by 2013, second only to the United States. According to an estimated average car scrappage deadline of 10-15 years, China will see the first car scrappage peak in 2015.

China's overall automobile scrap rate was only 4% in 2013, far lower than 6%-8% of developed countries, mainly because national policies on motor vehicle liquidation are still unclear and the industry still desires to be regulated. At the same time, China's low capacity to formally dismantle and process end-of-life vehicles (ELVs) is far behind the needs.

Based on China's car ownership and its growth rate, and 6-8% ELVs of car ownership in mature markets, China's ELVs will reach 9-12 million by 2015 and 12-16 million by 2020, showing a great amount of scrap. There is a great quantity of valuable resources in ELVs, a large number of parts among them can be recycled through remanufacturing. If only scrap steel, scrap tire, waste plastics and scrap non-ferrous metal content in ELVs are considered in statistical analysis, its industry scale will reach about RMB177.8 billion in 2015; if parts remanufacturing and related equipment needs are included, the figure will be far above RMB200 billion.

Distribution of Scrap Automobile and Companies in China, 2013



Sources: China End of Life Vehicles (ELV) Dismantling Industry Report, 2014-2017; ResearchInChina

In 2013 a total of 576 Chinese enterprises obtained auto dismantling and recycling qualification, up 10.34% year on year; 2,268 auto recycling outlets, up 1.39% year on year. ELV recycling and dismantling network is taking shape in China, but related enterprises are generally featured by small production scale, low recycling amount and scattered resources. Shanghai Xinzhuang Auto Dismantling Co., Ltd., for example, is China's largest automobile dismantling company, but its annual processing capacity is merely 25,000 vehicles.

China End-of-Live Vehicle (ELV) & Dismantling Industry Report, 2014-2017 includes the following:

- Development environment, industry barriers, trend prediction, etc. of China ELV & Dismantling industry;
- Scale, market segments, etc. of China resource utilization industry;
- Market size and competition pattern of China ELV & dismantling industry as well as industry policies and development status of developed countries;
- Operation, ELV & Dismantling business, etc. of 15 key players in China (Huahong Technology, GEM, Miracle Automation, etc.)

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