

China Automotive Heat Exchanger Industry Report, 2014-2018

June 2015

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

As key automotive components, automotive heat exchangers include radiators, evaporators, condensers, air coolers, oil coolers, exhaust gas recirculation (EGR) coolers and the like.

In 2014, there were around 500 heat exchanger manufacturers in China, including 10 large-sized enterprises and over 30 medium-sized ones. In the field of automotive heat exchangers, the world's renowned companies like DELPHI, DENSO, MODINE, VALEO and Visteon have set up factories in China by sole proprietorship, joint ventures or holding companies. In addition, local Chinese brands are emerging, such as Zhejiang Yinlun, Weifang HengAn, Guizhou Yonghong, Yangzhou Tank, Nanchong Kangda, Nanning Baling, etc.

The report studies the market segments -- radiators, intercoolers, EGR coolers and oil coolers. Driven by automobile output and replacement demand, China's market demand for automotive heat exchangers will keep a growth rate of about 7%; wherein, pressurized intercoolers and EGR coolers will continue to maintain high growth, with the growth rate of beyond 15%.

Intercoolers are mainly installed in heavy-duty trucks, large buses, some medium and light-duty buses. Major Chinese intercooler manufacturers consist mainly of Shanghai BHER, Zhejiang Yinlun Machinery, Jiangsu Jiahe Thermal System Radiator, and Ningbo Lurun Cooler.

EGR coolers are important parts of EGR system. In China, EGR system is mainly applied to light trucks and European heavy trucks. Up to now, Chinese EGR system and parts enterprises embrace Wuxi Longsheng, Yibin Tianrui Da, Zhejiang Jiulong, Zhejiang Yinlun Machinery, Kunshan Pierburg, Ningbo BorgWarner and so forth. Zhejiang Yinlun Machinery is primarily engaged in EGR coolers at present. With the implementation of the national emission standards IV, EGR + DOC + POC will become the mainstream under the premise of light commercial vehicles using common rail technology; by then, EGR system and parts companies will see good prospects for development.

The report covers the following:

- Demand, characteristics and competition patterns of the global automotive heat exchanger market;
- Demand, development features and key manufacturers of Chinese automotive heat exchanger market;
- Demand and major manufacturers of Chinese automotive heat exchanger market segments;
- Operation, heat exchanger business and development prospects of 8 international companies and 12 local peers.

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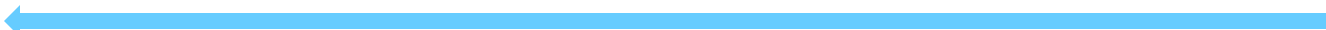
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