



# **Global and China Automotive Wheel Industry Report, 2014-2015**

**Apr. 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

Global and China Automotive Wheel Industry Report, 2014-2015 highlights the following:

1. Global automobile market and industry
2. Chinese automobile market and industry
3. Global automotive wheel market and industry
4. Chinese automotive wheel market and industry
5. 37 automotive wheel companies

In 2014, automotive wheel industry remained stable, but the market became increasingly divided, with low-cost cars adopting ever-cheaper steel wheels and premium models employing higher-priced aluminum wheels. North America and Europe performed excellently. Although with the highest growth in car sales globally, China found a declined installation rate of aluminum wheel, as more low-end auto models appeared on the market and carmakers tried to cut costs. Huge downward pressure on the Chinese economy caused decline in commercial vehicle sales, thus sharply slashing revenue and profits of companies of steel wheel for commercial vehicles.

The big players grow even bigger. During 2011-2013, these industry giants, fearing of overcapacity, rarely expanded their capacities. As time has shown, small players have no access to OEM market at all, while AM stagnates. From 2014, big companies started to feel a shortage of capacity and then expanded production aggressively.

The first mover CITIC Dicastal, the largest wheel maker in China, invested USD140 million in Dec. 2014 to build a production base with annual capacity of 3 million wheels in Greenville, Michigan. Following, the conservative Japanese player, Chuo Seiki, is expected to put its new North American base with investment of USD20 million into operation in Aug 2015.

Ronal, the second largest wheel maker in Europe, invested and built a new factory in Mexico in Nov 2014, which has a designed annual capacity of 2 million wheels, plans to hire 500 employees, and goes into production in the first quarter of 2016. Uniwheel, the third largest wheel company in Europe, decided to build a third factory in Poland in the second half of 2015, with designed capacity of 2 million wheels per year and expected to go into operation at the end of 2017.

## Ranking of Major Wheel Companies Worldwide by Revenue, 2011-2014

(USD mln)	2011	2012	2013	2014
<i>Iochpe-Maxion</i>	308	2,050	2,059	1,948
<i>DICASTAL</i>	1,543	1,889	2,100	2,286
<i>CMW</i>	1,630	1,810	1,790	1,638
<i>ENKEI</i>	1,280	1,176	1,240	1,260
<i>RONAL</i>	1,010	925	965	996
<i>SII</i>	822	821	790	745
<i>BORBET</i>	1,008	1,105	1,140	1,083
<i>Zhengxing</i>	637	592	614	553
<i>ALCOA</i>	620	692	702	786
<i>Accuride</i>	407	414	364	402
<i>Lioho Machinery</i>	485	408	370	410
<i>UNIWHEEL</i>	466	411	450	482
<i>LIZHONG</i>	294	373	435	474
<i>WANFENG AUTO WHEEL</i>	327	356	400	505
<i>Sheng Wang Auto Parts</i>	280	329	352	402
<i>Zhejiang Jinfei Machinery Group</i>	249	308	291	358
<i>Changchun Faway Automobile Components</i>	120	128	117	133
<i>Dongfeng Automotive Wheel</i>	196	166	194	247
<i>Ningbo Baody Autoparts</i>	103	120	130	90
<i>Shandong Xingmin Wheel</i>	233	180	207	208
<i>Yueling Wheels</i>	133	128	136	136
<i>Zhejiang Jingu</i>	120	132	188	215
<i>YHI</i>	128	117	128	146
<i>DONGWHA</i>	497	450	452	457
<i>SuperAlloy Industrial</i>	90	125	135	166

### 1 Global Automobile Market

- 1.1 Global Automotive Market
- 1.2 Global Automotive Industry
  - 1.2.1 Volkswagen
  - 1.2.2 Benz and BMW
  - 1.2.3 Volvo, PSA, Fiat
  - 1.2.4 GM, Hyundai
  - 1.2.5 Toyota
  - 1.2.6 Renault-Nissan

### 2 Chinese Automobile Market and Industry

- 2.1 Overview of Chinese Automotive Market
- 2.2 Recent Developments of Chinese Automotive Market
- 2.3 Analysis on Chinese Automotive Market
- 2.4 Sales Volume of Typical Chinese Automakers

### 3 Global and Chinese Wheel Market and Industry

- 3.1 Global Aluminum Wheel Market
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- 3.3 Supporting Relation between Aluminum Wheel Makers and Automakers
- 3.4 China's Wheel Exports
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- 3.6 China Steel Wheel Industry
- 3.7 Ranking of Global Wheel Enterprises

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  - 4.1.1 Dicastal Xinglong
  - 4.1.2 Binzhou Movever Dicastal Wheel
  - 4.1.3 Chongqing Dicastal Jieli
- 4.2 Lizhong Wheel
- 4.3 Zhejiang Jinfei Machinery Group
- 4.4 SMX Dicastal Wheel Manufacturing
- 4.5 Lioho Machine Works
  - 4.5.1 Liufeng Machinery Industry Co., Ltd.
  - 4.5.2 Lioho Light Metal (Kunshan) Co., Ltd.
  - 4.5.3 Hunan Changfeng Lioho Aluminum/Magnesium Products
- 4.6 Sheng Wang Auto Parts
- 4.7 Zhejiang Wanfeng Auto Wheel
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- 4.23 TOPY
- 4.24 KWC

- 4.25 Qingdao Donghwa Casting (Hands)
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- 4.27 Shanghai Mingqi Aluminium Industry
- 4.28 Lianyungang Qichuang Aluminum Products
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- 4.30 Kosei Aluminum
- 4.31 SuperAlloy Industrial Co., Ltd.
- 4.32 Ningbo Baody Autoparts

### 5 Steel Wheel Companies

- 5.1 Dongfeng Automotive Wheel
- 5.2 Zhengxing Wheel
- 5.3 Changchun Faway Automobile Components
- 5.4 Shandong Xingmin Wheel
- 5.5 Jingu Wheel

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