



# Global and China Automotive Drive Shaft Market Report, 2015

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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 needed 62.44 million automotive drive shafts in 2014, of which 79% came from passenger vehicles. Up to now, Chinese automotive drive shaft companies have been capable of developing and producing drive shafts for construction machinery, commercial vehicles and passenger vehicles. However, most of domestic drive shaft producers are small sized and focus on low- and mid-range products, compared with a lower proportion of high-precision, high technical content and high value added products, especially high-end constant velocity (CV) drive shaft market, which is still dominated by foreign brands.

Drive shaft, depending on whether constant angular velocity rotates or not, can be divided into CV drive shaft and non-CV drive shaft.

CV drive shaft, primarily used in passenger vehicle market, enjoys huge market demand. Shanghai GKN Drive Shaft Co., Ltd. (SDS), a supplier holding a dominant position, is a joint venture of GKN Driveline International GmbH and HUAYU Automotive Systems Co., Ltd. SDS now has production bases in Kangqiao (Shanghai), Chongqing, Wuhan and Changchun. GKN Drive Shaft (Chongqing) Co. Ltd. is a joint venture established by SDS and Chang'an Automobile Group.

Non-CV drive shaft is principally used in commercial vehicles, construction machinery, and a small minority of passenger vehicles. Due to limited demand from downstream markets in recent years, non-CV drive shaft market has been highly competitive. Major players in the field include Xuchang Yuandong Drive Shaft Co., Ltd. and Wanxiang Qianchao Co., Ltd.

Xuchang Yuandong Drive Shaft Co., Ltd. is the largest non-CV drive shaft manufacturer in China, producing mainly drive shafts for varied construction machinery including light, medium-duty and heavy trucks, pickups, SUVs, buses, loaders and cranes. In 2014, the company sold 3.5007 million drive shafts, up 19.06% from 2.9402 million units in 2013, mainly due to significant rise in sales of light drive shaft arising from adjustment in sales structure.

Wanxiang Qianchao had drive shaft capacity of 4 million units and sold 3.29 million units in 2014. The production of drive shaft is chiefly undertaken by Qianchao Transmission Shaft Co., Ltd., which has 5 factories and 1 research institute, producing mainly drive shafts, steering columns, EPS and other auto parts. Due to a fiercely competitive drive shaft market, the company underwent a decline in drive shaft utilization to 83% in 2014 from 97% in 2013.

The report highlights the followings:

Overview of China automotive drive shaft industry, including definition, classification, etc.;

Overall study into the Chinese automotive drive shaft market, covering demand, market competition pattern, latest market characteristics;

Study into the Chinese automotive drive shaft market segments, CV drive shaft and non-CV drive shaft market demands and major companies;

Study into major Chinese automotive drive shaft companies, comprising operation, output and sales volume of drive shaft, main customers, and new products.

## Layout of Major Foreign Drive Shaft Companies in China, 2015

<b>Company</b>	<b>Layout</b>
<b>Dana</b>	<i>Entered China in 1991, and now has 7 factories to produce main parts for automobile, commercial vehicles and off-road vehicles. Drivetrain products are sold in brand Spicer®. The subsidiary that produces drive shaft in China is Shenyang Spicer Driveshaft Co., Ltd., a joint venture of ROC Spicer (a joint venture of Dana and Yulon Group) and Jinbei Auto.</i>
<b>GKN</b>	<i>The production of drive shaft is mainly undertaken by SDS. In 2006, SDS and Chang'an Automobile Group co-founded GKN Drive Shaft (Chongqing) Co. Ltd. In 2015, in order to expand vehicle customer base, Chongqing branch raised the plant capacity by about 2 times.</i>
<b>AAM</b>	<i>Axles and drive shafts are main sources of the company's revenue. Factories in China include Changshu AAM Automotive Driveline High Technology Manufacturing Co., Ltd. and Hefei AAM Automotive Driveline &amp; Chassis System Co., Ltd., with the former engaging in the production of transmission shafts and drive shafts.</i>
<b>Magna</b>	<i>Entered China in 1996, and now has 22 factories, 8 R&amp;D centers and sales offices, with more than 8,000 employees. Main powertrain factories include MAGNA Powertrain (Changzhou) Co., Ltd. and Magna Auto Powertrain (Tianjin) Co., Ltd.</i>
<b>NTN</b>	<i>The companies that involve in the production of drive shafts are Guangzhou NTN-Yulon Drivetrain Co., Ltd. and Beijing NTN-Seohan Driveshaft Co., Ltd., with the former mainly serving Xiangyang factory of Dongfeng Nissan, as well as Zhengzhou Nissan, Dongfeng Honda, Dongfeng Renault and BMW Brilliance 5 series. Guangzhou NTN-Yulon Drivetrain planned to add two production lines in the second half of 2015, and would be capable of producing 7.20 million CV drive shafts once the whole project reaches designed capacity.</i>

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- 1.1 GDP
- 1.2 Fixed-asset Investment
- 1.3 Import and Export
- 1.4 Total Retail Sales of Consumer Goods

### **2 Definition and Classification of Drive Shaft**

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