



**China Automotive Clutch Industry Report,
2015-2018**

Aug.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

A surge in automobile output drives rapid expansion in market size of parts like automotive clutch. The demand for automobile clutch assembly amounted to 9.01 million sets in China in 2014, up 8.3% from a year earlier.

Regarding competitive landscape, there are a great number of companies in China's automobile clutch industry, which features fierce competition and high market concentration. A few powerful automobile clutch companies dominate vehicle supporting market and high-end after-sales service market; other small-sized and technologically weak players serve mainly middle and low-end after-sales service market.

In commercial vehicle market, domestic own-brand commercial vehicle clutch companies have established long-term and stable supporting relations with vehicle makers and held a firm leading position.

Meanwhile, private automobile clutch companies, relying on their own advantages, also enter the supporting system of domestic commercial vehicle. Main competitors include Rongcheng Huanghai Clutch, Dongfeng Automotive Propeller Shaft, Changchun Yidong Clutch, Zhejiang Tieliu Clutch, Zhejiang VIE Science & Technology, and Zhejiang Asia-Pacific Mechanical and Electronic.

In passenger vehicle market, JV (Joint Venture) passenger vehicle makers have a stranglehold on the Chinese middle and high-end passenger vehicle market. Hence, passenger vehicle clutch market has formed a pattern in which foreign fund-backed clutch companies play a key role and domestic own-brand clutch firms a supplementary role. Major market participants include ZF, EXEDY, Schaeffler, F.C.C, BorgWarner, Valeo, etc.

China Automobile Clutch Industry Report, 2015-2018 highlights the followings:

- Overview of China's automobile clutch industry, including definition & classification, policies and regulations, etc.;
- Analysis of China's auto industry, embracing overall situation, passenger vehicle & commercial vehicle, parts industry, etc.;
- Analysis of the Chinese automobile clutch market, covering market size, import & export, competitive landscape, supporting;
- Profile, financial performance, output & sales volume, main customers, hit products, R&D, distribution of production bases, and technical characteristics of six foreign companies (ZF, EXEDY, Schaeffler, F.C.C, BorgWarner, Valeo) and eleven Chinese peers (like Zhejiang Asia-Pacific Mechanical and Electronic, Zhejiang VIE Science & Technology, Changchun Yidong Clutch, Zhejiang Tieliu Clutch, Tri-Ring Clutch, Dongfeng Automotive Propeller Shaft).

No.	Manufacturer	Capacity (million sets)	Major automakers supported
1	Exedy (Chongqing) Driving System Co., Ltd.	4.5	Dongfeng Nissan, Chang'an Automobile Group, FAW Car, Qingling Motors, Dongfeng Honda, BYD
2	Zhejiang Tieliu Clutch Co., Ltd.	3.5	Xiamen King Long, Higer Bus, Golden Dragon Bus, Youngman Automobile, JAC Motors, Beiqi Foton Motor
3	Shanghai Sachs Power Assembly Parts System Co., Ltd.	3	Shanghai Volkswagen, Shanghai GM, SAIC Motor, SAIC-GM-Wuling, FAW Group, FAW-Volkswagen, Chang'an Ford, Jiangling Motors, Zhengzhou Nissan
4	Ningbo Hongxie Clutch Co., Ltd.	3	Chery, FAW Tianjin, Lifan, Geely
5	Nanjing Valeo Clutch Co., Ltd.	2.3	Dongfeng Nissan, Dongfeng Peugeot, Shanghai Volkswagen, FAW-Volkswagen, Chery, BYD, Beijing Hyundai, Shanghai GM, China National Heavy Duty Truck Group, Nanjing IVECO
6	Changchun Yidong Clutch Co., Ltd.	2	FAW Group, Chongqing Chang'an, Great Wall Motors, Harbin Dongan Auto Engine, Beiqi Foton Motor, FAW Tianjin, Shenyang Xinguang Brilliance Auto Engine, Mianyang Xinchun Engine, Shanxi Heavy Trucks, BYD, Beiben Trucks, Chongqing Lifan, Zhengzhou Yutong
7	Rongcheng Huanghai Clutch Co., Ltd.	2	China National Heavy Duty Truck Group, Beiqi Foton Motor, Beiben Trucks, Chongqing Hongyan Automobile, Dayun Motor, Foton Lovol International
8	China and Canton Clutch Co., Ltd.	1.8	BAIC Group, Chery, BYD
9	Hubei Tri-Ring Clutch Co., Ltd.	1.5	FAW Group, Dongfeng Motor Group, JAC Motors, Chang'an Automobile Group, Dongfeng Peugeot-Citroën Automobile, Beiqi Foton Motor, Chery
10	Guilin Fuda Co., Ltd.	1.3	Beiqi Foton Motor, Shanxi Heavy Trucks, SAIC-Iveco Hongyan, BAIC Motor, Zhengzhou Nissan, Zhengzhou Yutong

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