China Commercial Vehicle Exhaust Emission System Industry 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

Since 2014, the output and sales volume of commercial vehicles in China have continued to decline, with the output and sales volume for Jan.-Jul. 2015 totaling 1.9837 million units and 1.9891 million units, respectively, down 14.62% and 13.89% year-on-year. That was mainly because economic downturn led to a fall in demand for commercial vehicles. On the other hand, the emission standards for diesel vehicles are so unprecedentedly strict that the industry is contracting to achieve industrial upgrading.

At present, China's mainstream line for National IV emission standard has been identified as follows: Heavy and medium-duty commercial vehicles adopt SCR system while light-duty commercial vehicles use EGR+DOC/POC system.

From the perspective of the development of SCR industry, China’s SCR industry is in the early stage of growth. Although there are much more newcomers, yet the number of excellent enterprises is still small. The autonomous enterprises include Weifu Lida, Kailong High Technology, and ZHEJIANG YINLUN MACHINERY, and the foreign-funded enterprises mainly involve Commins and TENNECO.

Among them, Weifu Lida boasts prominent SCR technical capacity. In the whole industry chain, all core parts are produced independently except carrier that is outsourced from outside. In H1 2015, the company recorded revenue of RMB1.326 billion and net income of RMB141 million, up 53.71% and 60.93%, respectively, on a year-on-year basis.

ZHEJIANG YINLUN MACHINERY specializes SCR system assembly and catalytic converters that are applicable to heavy and medium-duty diesel-powered vehicles. As one of the major SCR converter suppliers of Weichai, the company has advantages in the field of packaging. In H1 2015, the company reported revenue of RMB1.421 billion, up 18.31% year-on-year; net income of RMB104 million, up 27.79% year-on-year.

The autonomous EGR manufactures in China primarily include ZHEJIANG YINLUN MACHINERY, WUXI LONGSHENG TECHNOLOGY, and YIBIN TIANRUIDA AUTO PARTS while foreign-funded enterprises consist of Kunshan Pierburg, Ningbo BORGWARNER. Among them, WUXI LONGSHENG and YIBIN TIANRUIDA specialize in EGR valve and EGR system; ZHEJIANG YINLUN principally operates EGR cooler, which registers an around 9% market share in China. In the field of light-duty trucks, YINLUN occupies nearly a 50% share of total EGR cooler market, and thus its capacity for market penetration is increasing year by year.

The report mainly deals with the following:

※ Development background, industry standards and policies, as well as technology roadmap of commercial vehicle exhaust emission system industry;

※ Development of SCR system and EGR system industries, including their system structure, market pattern, market size, and main supported vehicle manufacturers;

※ Development of downstream market, including commercial vehicle production and sales, bus and truck production and sales, as well as the prediction of production and sales volume for 2015-2018;

※ 10 major SCR system manufacturers, 5 EGR system manufacturers, and 5 POC/DOC catalyst manufacturers in China, including their operation, related product business, latest developments, development in China (mainly foreign enterprises), and relevant product supporting manufacturers, etc.

SCR Catalytic Converter Suppliers of Major Chinese Heavy-duty Diesel Vehicle Manufacturers (National V standards)

Vehicle Manufacturers	SCR Catalytic Converter Suppliers
Ankai Automobile	Cummins, Guangxi Sunlight Technology, Suzhou PowerGreen Emission Solution System, and Weichai Power
JAC	Cummins, Weichai Power Freshen Air Technology
Beijing Foton Daimler	Cummins, Weichai Holding Group, and Weichai Power Freshen Air Technology
Beiqi Foton Motor	Cummins, Eberspacher, Guangxi Sunlight Technology, Suzhou PowerGreen Emission Solution System, and Weichai Power Freshen Air Technology
Dongfeng Liuzhou Motor	Cummins, Guangxi Sunlight Technology, and Weichai Holding Group
Kinglong United Automotive Industry (Suzhou)	Guangxi Sunlight Technology, Weichai Holding Group, Wuxi Weifu Lida Catalytic Converter, and FAW
Xiamen King Long United Automotive	Guangxi Sunlight Technology, Suzhou PowerGreen Emission Solution System, Weichai Holding Group, and FAW
Shanghai Shenlong	Guangxi Sunlight Technology, Shanghai Diesel Engine, and Weichai Holding Group
SUNWIN	Guangxi Sunlight Technology, Shanghai Diesel Engine, and Weichai Holding Group
Shanghai Wanxiang Automobile	Guangxi Sunlight Technology, Shanghai Diesel Engine, and Weichai Holding Group
XCMG	Purem, Shanghai Diesel Engine, Weichai Holding Group, and China National Heavy Duty Truck Group
Yutong Bus	Cummins, Guangxi Sunlight Technology, Suzhou PowerGreen Emission Solution System, Weichai Holding Group, and Wuxi Weifu Lida Catalytic Converter

Source: ResearchInChina

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