



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

**Sep. 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

Tightness is an important indicator to measure the quality of the vehicle, and sealing system is also one of the most widely used parts in automobile. The sealing system primarily plays a role in filling the gap, absorbing and reducing vibration, deadening the noise, providing a route for mobile parts, and making up the errors in metal plate fabrication and assembly.

The excellent durability and longer service life of automotive weather-strip makes a relatively small after-sales maintenance market, and the demand is mainly concentrated in complete vehicle supporting field. In 2014, China produced 23.72 million vehicles. Calculated on the basis of around 45-meter weather-strip for a car, about 1.067 billion meters of automotive weather-strip would be needed. China's demand for automotive weather-strip in 2015 is negatively affected by slower growth in new car sales and expected to go up 2%-3% year on year.

As to competitive landscape, automotive seal manufacturers are mainly joint ventures or sole-investor enterprises set up by a dozen auto groups, resulting in a relatively stable pattern of supply and demand.

## Major Seal Suppliers and Supported Customers in China, 2015

Manufacturer	Major Carmaker Supported
Huayu-Cooper Standard Sealing Systems Co., Ltd	SAIC Motor, Shanghai Volkswagen, Shanghai GM, Guangqi Honda Changan Ford, etc.
Cooper (Wuhu) Automotive Co., Ltd.	Shanghai GM, BMW Brilliance, Changan Ford, Ford Philippines, Ford South Africa, Chery, etc.
Beijing Wanyuan-Henniges Sealing Systems Co., Ltd.	FAW Volkswagen, FAW Group, Shanghai GM, Shanghai Volkswagen, Dongfeng Peugeot-Citroën, Picasso, Jinbei GM, Beijing Jeep, etc.
Kinugawa Rubber and Plastic Guangzhou Co., Ltd.	Dongfeng Nissan, Guangqi Honda, etc.
Fuzhou Fukwang Rubber & Plastic Co., Ltd.	Zhengzhou Nissan, Isuzu, Fuji Heavy Industries (Subaru), Southeast (Fujian) Motors, Beijing Benz, Guangqi Honda, Changan Ford, Mazda, Dongfeng Motor, etc.
Kinugawa Rubber and Plastic Wuhu Co., Ltd.	Chery, Chery Commercial Vehicle (Anhui), Dongfeng Motor Group, etc.
Shanghai Nishikawa Sealing System Co., Ltd.	Toyota, Honda, Nissan, Mazda, etc.
Guangzhou Nishikawa Sealing System Co., Ltd	GAC Toyota, Ford, Mazda, Nissan, Guangqi Honda, etc.
Toyota Gosei (Foshan) Rubber Parts Co., Ltd.	GAC Toyota, Dongfeng Honda
Tianjin Star Light Rubber and Plastic Co., Ltd.	FAW Tianjin, FAW Toyota, Guangqi Honda, Zhengzhou Nissan, Beijing Foton, Shenyang Brilliance, etc.
Hwaseung Automotive Parts (Taicang) Co., Ltd.	Hyundai, Yueda Kia, GM, etc.
Zhejiang Xiantong Rubber & Plastic Co., Ltd.	SAIC Motor, FAW Group, Geely, Chery, Changan, etc.
Chengdu FAW Sihuan Hengxing Auto Parts	FAW Volkswagen, etc.
Guangzhou Minhui Automobile Parts	Dongfeng Nissan, etc.
Guizhou Guihang Automotive Components Co., Ltd.	FAW Haima, GM-Wuling, Brilliance Jinbei, Chongqing Changan, FAW Tianjin, etc.
Hubei Faltec Automotive Parts	Dongfeng Nissan, etc.
Jianxin Zhao's Group Corp	FAW Volkswagen, Audi, Shanghai Volkswagen, Mercedes-Benz, Chrysler, China Motor Corporation, etc.
Wuhan Donghai Minth Auto Parts	BAIC Motor, Dongfeng Honda, Dongfeng Nissan
Chongqing Jiakuan Automobile Sealings Co., Ltd.	Changan Ford, Shanghai GM, SAIC Motor, Changan Group, Changan Suzuki, SAIC-GM-Wuling, Dongfeng Liuzhou Motor, etc.
Tieling Brilliance Rubber & Plastic Products	Brilliance Jinbei, FAW Group, Dongfeng Motor, etc.
Changzhou Light Rubber & Plastic Co., Ltd.	Shanghai Volkswagen, Shanghai GM, Yantai Dongyue (GM), Shenyang Norsom (GM), Nanjing Changan Automobile, Chery (Wuhu)

Local Chinese automotive weather-strip companies support mainly homegrown brands and small-displacement models, while most joint-venture brands and high-end auto models prefer weather-strip from large multinational auto parts companies. In 2014, domestic Chinese seal companies seized about 45% market share and joint ventures & foreign companies the remaining 55%. It is noteworthy that some local seal players are gradually entering the supply chain of JV and high-end automakers via overseas M&As and technological improvement, such as Anhui Zhongding Sealing Parts, Guizhou Guihang Automotive Components, and Minth Group, with the first having become a supplier of high-end seals (including the ones for EV and new energy vehicles) through active overseas M&As.

China Automotive Seal Industry Report, 2015-2018 highlights the followings:

- Overview of automotive seal industry in China, including definition & classification of product, characteristics of product and process, main policies, etc.;
- Overview of automobile and parts industry in China, covering output & sales of different categories of automobiles, competitive landscape, market size of main parts, etc.;
- Overview of automotive seal industry in China, including market size, competitive landscape, supporting relationship, industry forecast, etc.;
- Analysis of 6 multinational companies (Cooper-Standard, Henniges Automotive, Toyoda Gosei, Kinugawa, Nishikawa Rubber, Hwaseung R&A) and 12 domestic counterparts including Anhui Zhongding Sealing Parts, Guizhou Guihang Automotive Components, Minth Group, Jiangyin Haida Rubber and Plastic, Jianxin Zhao's Group Corp, Guizhou Jingzhong Rubber & Plastic Industry, and Chongqing Jiaxuan Automobile Sealings, containing profile, financial position, main products, R&D, production bases, technical features, etc.

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