



China NVH (System, Parts, Materials) Industry Report, 2016-2020

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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

NVH stands for noise, vibration, and harshness, and the noise is what the driver and passengers can hear, the vibration is what they can feel and the harshness is how much of an effect thumps, bumps, noise and vibration have on the cabin and its occupants. It is an aggregative indicator with which to measure the quality of automobile manufacturing. As many as one-third vehicle faults are related to the NVH of vehicles.

Automotive NVH parts can fall into shock absorber products and noise reduction products, of which the former includes rubber shock absorber products and spring damping shock absorbers while the latter consists of sound insulation products and sealing products.

1. Rubber Shock Absorber Product Market

In recent years, with the rapid growth of automobile output in China, the market size of rubber shock absorber products has kept expanding, to reach RMB18.635 billion in 2015; wherein the proportion of OEM market came to 74% and AM market 26%. China's automobile industry will enter a stage of low-speed growth during 2016-2020, when the growth rate of shock absorber product market will also slow down to around 6%. At present, there are only 50 or so rubber shock absorber product manufacturers in China that have entered OEM passenger vehicle market.

Moreover, few enterprises have the capability of synchronous R&D, system integration and supply, and thus some high-grade rubber shock absorber products have to be imported from overseas. Major enterprises include Tuopu Group, Anhui Zhongding Damping Rubber Technology Co., Ltd., and JX Zhao's Group Corp.

2. Sound Insulation Products Market

In 2015, the market size of sound insulation products (mainly used in OEM market) in China totaled about RMB22.05 billion. As the output of automobiles grows, the figure is expected to reach RMB 28.31 billion in 2020.

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Market Size of Rubber Shock Absorber Products in China, 2011-2020E



Source: ResearchInChina

Given the fact that sound insulation products have relatively low technical requirements, the Chinese enterprises can basically meet the supplying demand from domestic automobile manufacturers, with adequate market competition. At present, there are more than 100 sound insulation product producers in China, mainly including Tuopu Group, Changshu Automotive Trim, as well as Shanghai Car Carpet Plant.

It is crucial for Automotive NVH parts manufacturers to have the capacity of synchronous R&D and system integration. Currently, China is relatively weak in system integration, and only a few domestic enterprises such as Tuopu Group, Anhui Zhongding Sealing Parts and Zhuzhou Times New Material Technology have certain competence of development and system integration.

Tuopu Group has more powerful NVH system integration capability, successively participating in the synchronous research and development of auto makers including Shanghai GM, Chrysler, BMW, Audi, Volvo, SAIC, Changan Ford, and Changan Auto. Meanwhile, the company has also established long-term cooperative relationship with world-renowned automotive system integration providers like Valeo, Faurecia, and Benteler.

Zhongding Holding and Zhuzhou Times New Material Technology achieved an increase in value of product and technology by acquiring foreign companies with comparative advantages in automotive NVH. For example, Zhuzhou Times New Material Technology acquired BOGE, the world's third largest NVH supplier; Anhui Zhongding Sealing Parts has in recent years purchased AB, BRP, MRP, COOPER, KACO, and WEGU.

The report is primarily concerned with the following:

- Development, system integration, competitive landscape, and development trend of automotive NVH market in China;
- Market size, competitive landscape, and development prospects of automotive NVH market in China, including rubber shock absorber product, sound insulation products, and sealing products;
- Supply and demand, import and export, and price trend of raw materials, including rubber, PU, PP, and PE;
- Development, industry operation, and import and export of downstream auto parts industry;
- Output and sales, development trend of downstream automobile industry;
- Profile, NVH business, supported customers, and operation of 10 automotive NVH parts manufacturers in China.

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