China Electric Vehicle Air-conditioner Industry Report, 2017-2021

Mar.2017

ResearchInChina
www.researchinchina.com

ResearchInChina

The Vertical Portal for China Business Intelligence

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.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Abstract

With exemption of purchase tax and full launching of preferential policies including central and local fiscal subsidies, NEV sales witness explosive growth. As a standard configuration of a car, air-conditioning system also experiences strong development with China's demand for EV air-conditioners reporting 516,300 units in 2016 as per one air-conditioner for a car, a year-on-year surge of 40.7%.

Affected by the "subsidy fraud" scandal, China's EV output and sales will suffer a decline in growth rate but still maintain a higher pace over the next couple years, creating an estimated demand of 1.1524 million air-conditioners in 2021, a CAGR of 17.4% during 2016-2021.

The market of air-conditioners for large and medium-sized buses is highly concentrated with major players including Songz Automobile Air Conditioning, Zhengzhou Kelin Motor Vehicle Air Conditioning, etc. Songz serves carmakers including BYD, Nanjing Golden Dragon Bus, Ankai Bus, and Zhongtong Bus, while Kelin mainly provides EV air-conditioners for its parent company Yutong Bus.

The market of air-conditioners for electric passenger cars is lowly concentrated with key market participants including Nanjing Aotecar New Energy Technology, Denso (Toyota Industries), Sanden Huayu Automotive Air-Conditioning, Xiezhong International, Valeo, and Hanon Systems. Foreign-funded companies are still technologically superior. As the first company launching electric air-conditioners in the world, Denso has applied its products to EVs and HEVs made by Toyota and other companies with compressors coming primarily from Toyota Industries. Sanden Huayu Automotive Air-Conditioning adopts "battery, motor, and electronic control" technology for electric compressors which have already been used in auto models like BAIC E150 EV, SAIC Rowe, and Riich M1. Nanjing Aotecar New Energy Technology provides mainly scroll compressors and aims at electric heat pump (EHP) air-conditioning compressor. Moreover, the company acquired Air International and Mudanjiang Foton Automotive Air Conditioner in recent two years, not only enriching product line but also realizing technology complementarity.

Passenger car air-conditioners are mostly sold to carmakers as standard configuration with characteristics of fierce competition, relative scattering, and lower profits; by contrast, bus air-conditioners are directly supplied to public transport and automobile transportation companies with stronger customer stickiness and gross margin of up to 40%.

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

China Electric Vehicle Air-conditioner Industry Report, 2017-2021 highlights the following:

◆Overview of China's EV air-conditioner industry (definition, classification, main policies, etc.);

◆China's EV industry (output & sales, competitive landscape, etc. of various types of EVs);

◆Overview of China's EV air-conditioner industry (market size, demand, supply model, etc.);

◆Chinese EV air-conditioner market segments (passenger car, bus, and special-purpose vehicle markets) (electric air-conditioner demand, market size, competitive landscape, supply relationship, and industry forecast);

◆8 manufacturers of air-conditioners for electric passenger cars (Sanden, Toyota Industries, Hanon Systems, Valeo, HUAYU Automotive Systems, Xiezhong International, Nanjing Aotecar New Energy Technology, Hefei Carnot Automotive Air Conditioning) and 6 manufacturers of air-conditioners for electric buses (Songz Automobile Air Conditioning, Zhengzhou Kelin Motor Vehicle Air Conditioning, Guangzhou Jingyi Automobile Air Conditioner, Suzhou New Tongchuang Auto Air-Conditioning, Hunan Vaqoung Electric, and Taichang Bus Air Conditioner) (profile, financial position, main products, R&D, production bases, technical characteristics, etc.)

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Development Characteristics of Air-conditioners for Electric Passenger Cars and Buses in China

	Air Conditioner for Electric Passenger Cars	Air Conditioners for Electric Buses
Market Demand (2016) (sets)	381,100	135,200
Market Size (2016) (RMB mln)	648	8,114
Sales Model	OEM standard configuration	Direct support for public transport and automobile transportation companies
Market Concentration	Low	High
Level of Profit	Low	High
Superior Enterprises	Foreign-funded	Chinese
Major Players	SANDEN, Aotecar 奥特佳, DENSO	SONGZ, 科林诺 CLING, JYAC

ResearchInChina

The Vertical Portal for China Business Intelligence

Table of contents

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com

Table of contents

Selected Charts

- Comparison of Traditional Auto Air Conditioning System and EV Air Conditioning System
- Difference between EV Air Conditioning System and Traditional Auto Air Conditioning System
- Schematic Diagram for EV Air Conditioning System Structure
- Performance Comparison of Compressor Drive Schemes
- Classification of EV Air-conditioners
- Policies on Auto Air-conditioner Industry in Recent Years
- Output of Electric Vehicles in China, 2012-2021E
- Output of Electric Passenger Cars in China, 2012-2016
- Top 20 Brands by Sales Volume of Electric Passenger Cars, 2016
- Output of Special Electric Vehicles in China, 2012-2016
- Monthly Output of New Energy Buses in China, 2015-2016
- Top 20 New Energy Bus Manufacturers in China by Output, 2016
- Demand for Electric Air-conditioners in China, 2012-2021E
- Market Size of Electric Air-conditioners in China, 2012-2021E
- Sales Models of Auto Air-conditioners
- Demand for Electric Bus Air-conditioners in China, 2012-2021E
- Market Size of Electric Bus Air-conditioners in China, 2012-2021E
- Demand for Air-conditioners from Electric Passenger Cars and Special Vehicles in China, 2012-2021E
- Market Size of Air-conditioners for Electric Passenger Cars and Special Vehicles in China, 2012-2021E
- Market Structure of Electric Air-conditioners for New Energy Vehicles by Air-conditioner Type, 2016
- Sanden's Development History in China
- Revenue and Net Income of Sanden, FY2010-FY2017
- Revenue Structure of Sanden by Product, FY2011-FY2017
- Revenue Structure of Sanden by Region, FY2012-FY2016
- Sanden's Major Electric and Hybrid Electric Compressor Series

Selected Charts

- Compressor Sales Volume of Sanden, FY2013-FY2017
- Sanden's Compressor Sales Volume by Region, FY2016-H1 FY2017
- Business Distribution of Sanden in China
- Revenue of Sanden in China, FY 2014-FY2016
- Revenue and Net Income of Toyota Industries Corporation, FY2010-FY2017
- Main Product Revenue of Toyota Industries Corporation, FY2011-FY2017
- Electric Compressor of Toyota Industries Corporation
- Models and Main Parameters of Toyota Industries Corporation's Main Electric Compressors
- Air Conditioning Compressor (by Type) Sales Volume of Toyota Industries Corporation, FY2015-FY2017
- Air Conditioning Compressor Sales Volume of Toyota Industries Corporation Worldwide, FY 2015-FY2017
- Air Conditioning Compressor Sales Volume of Toyota Industries Corporation, 2012-2021E
- Distribution of Toyota Industries Corporation's Air Conditioning Compressor Producing Areas
- Air Conditioning Compressor Capacity Distribution of Toyota Industries Corporation Worldwide, FY2012- FY2017
- Revenue and Net Income of Hanon Systems, 2009-2016
- Revenue Structure of Hanon Systems by Region, 2015-2016
- Revenue Structure of Hanon Systems by Customer, 2015-2016
- Capacity and Real Output of Hanon Systems' Main Products, 2015
- Hanon Systems' Climate Control System for EV/HEV
- Major R&D Institutions of Hanon Systems in China
- Major Subsidiaries of Hanon Systems in China
- Supply Relationship of Visteon's Auto Air-conditioning Compressor Suppliers
- Revenue and Net Income of Valeo, 2009-2016
- Revenue Structure of Valeo by Business, 2013-2016
- Revenue Structure of Valeo by Region, 2015-2016
- Valeo's Orderbook, 2005-2016

Selected Charts

- Valeo's Orders by Region, 2016
- Battery Thermal Management Solution of Valeo
- An Air Conditioning Loop of Valeo
- Profile of Valeo Compressor Changchun
- Profile of Huada Automotive Air Conditioning (Hunan)
- Profile of Sanden Huayu
- Revenue of Sanden Huayu, 2012-2016
- Sales Volume of Air Conditioning Compressor of Sanden Huayu, 2012-2016
- Parameters of Sanden Huayu's Air Conditioning Compressors
- Major Subsidiaries of Sanden Huayu
- Overseas Sales Network of Sanden Huayu
- Domestic Sales Network of Sanden Huayu
- Revenue of Aotecar by Business, 2014-2016
- Revenue of Aotecar by Region, 2014-2016
- Characteristics of Aotecar's Electric Compressors
- Output, Sales Volume and Inventory of Aotecar's Auto Air Conditioning Compressors and Systems, 2014-2015
- Characteristics of Main Compressors of Mudanjiang Foton
- Supply Relationship of Major Auto Air-conditioning Compressor Suppliers of Mudanjiang Foton
- Revenue and Net Income of Xiezhong International, 2010-2016
- Revenue of Xiezhong International, 2013-2016
- Profile of Hefei Carnot Automotive Air Conditioning
- Financial Indicators of Hefei Carnot Automotive Air Conditioning, 2014-2016
- Electric Air-conditioners of Hefei Carnot Automotive Air Conditioning
- Workforce of Songz, 2010-2015
- Revenue and Net Income of Songz, 2010-2016

Selected Charts

- Revenue of Songz by Product, 2014-2016
- Revenue Structure of Songz by Region, 2010-2016
- Gross Margin of Songz, 2009-2016
- Sales Volume of New Energy Bus Air-conditioners of Songz, 2013-2016
- Capacity and Output of Songz's Main Air Conditioning Products, 2013-2015
- Fundraising Projects of Songz, 2017
- Profile of Zhengzhou Kelin
- Revenue and Net Income of Zhengzhou Kelin, 2013-2016
- Main Electric Air-conditioners of Zhengzhou Kelin
- Profile of Guangzhou Jingyi Automobile Air Conditioning
- Technical Parameters of Split-type Electric Air-conditioners for Minibuses
- Technical Parameters of KRBPB Series Electric Air-conditioners (AC-Type)
- KRBPE Series Electric Air-conditioners (AC/DC Type)
- KRBPH Series Electric Air-conditioners
- KRBPB-D Series Electric Air-conditioners (AC/DC Type and DC-Type)
- Profile of New Tongchuang
- Technical Parameters of New Tongchuang's Roof-top Pure Electric Air-conditioners
- Profile of Vaqoung Electric
- Main Electric Auto Air-conditioners of Vaqoung
- Sales Network of Vaqoung
- Profile of Taichang Bus Air Conditioner
- Main Performance Parameters of Taichang Bus Air Conditioner's TCD06GZ
- TCD08ZB of Taichang Bus Air Conditioner
- TCD12W of Taichang Bus Air Conditioner

ResearchInChina

The Vertical Portal for China Business Intelligence

How to Buy

You can place your order in the following alternative ways:

1.Order online at www.researchinchina.com

2.Fax order sheet to us at fax number:+86 10 82601570

3. Email your order to: report@researchinchina.com

4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng,Landianchang,Haidian District,Beijing Bank Account No #: 110060668012015061217 Routing No # : 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license) ……..2,300 USD

Hard copy …… 2,500 USD

PDF (Enterprisewide license)…..... 3,700 USD

※ Reports will be dispatched immediately once full payment has been received. Payment may be made by wire transfer or credit card via PayPal.

ResearchInChina

www.researchinchina.com

ResearchInChina

The Vertical Portal for China Business Intelligence

RICDB service

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- ***Multi-users market reports***
- ***Database-RICDB***
- ***Custom Research***
- ***Company Search***

RICDB (http://www.researchinchina.com/data/database.html), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at:

Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080
Phone: +86 10 82600828 ● Fax: +86 10 82601570 ● www.researchinchina.com ● report@researchinchina.com