



**Global and China Automotive Wheel
Industry Report, 2017-2021**

August 2017

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

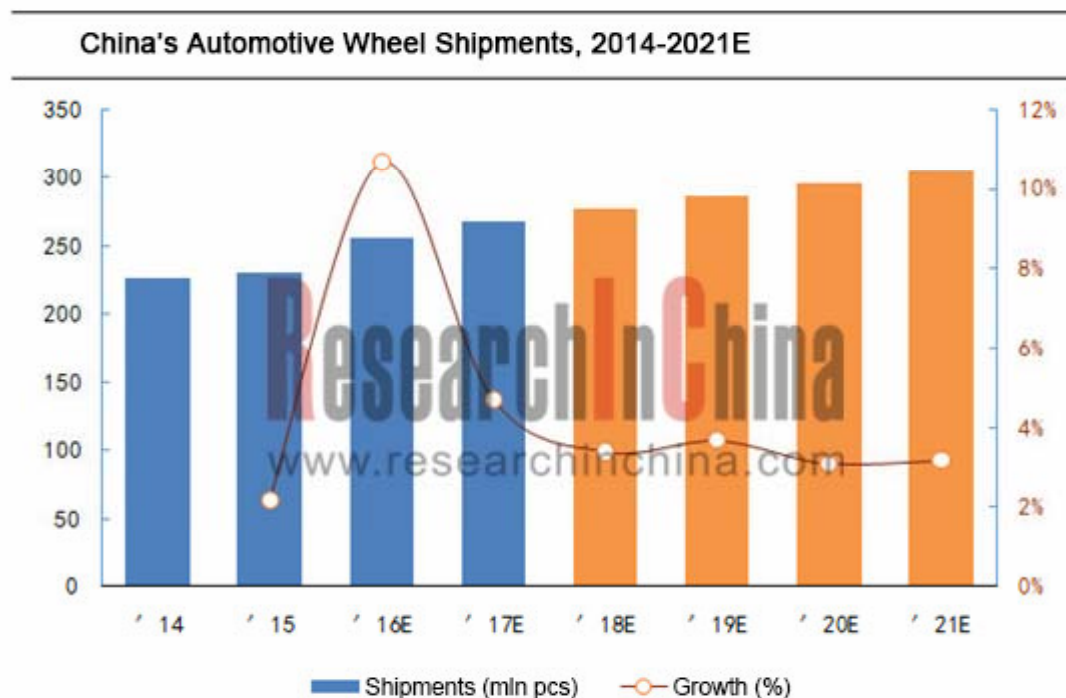
Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional 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

Wheel, one of essential parts of motor vehicle, finds its market demand directly connected with the automobile industry. China's auto production and sales hit record high in 2016, totaling 28.119 million units and 28.028 units, up 14.5% and 13.7% over the previous year, respectively, according to the data of China Association of Automobile Manufacturers (CAAM). Meanwhile, the country's wheel shipments rose by 10.7% year on year to 256 million pieces. As the automobile industry advances, wheel shipments will expand as well, reaching an estimated 305 million pieces in 2021, a CAGR of 3.6% over 2016.



Source: Global and China Automotive Wheel Industry Report, 2017-2021 Jul 2017

By material, automotive wheels can be divided into steel wheel and aluminum wheel with the former used primarily in commercial vehicles and cross passenger cars while the latter in passenger cars and some light commercial vehicles. In 2016, China recorded 75.74 million pieces in steel wheel shipments, up 9.9% from a year earlier, including 53.73 million OEM ones, 9.89 million AM ones and 12.12 million exported ones, and 180 million pieces in aluminum wheel shipments, an 11.0% increase against the previous year, including 89.57 million OEM ones, 17.46 million AM ones, and 72.73 million exported ones.

Competitive landscape: as OEM demand holds the lion's share, the companies seizing the segment gain the market. Only a few powerful wheel manufacturers take over much of the vehicle support market, such as top 10 players including CITIC Dicastal, Lizhong Wheel, Zhejiang Jinfei Kaida Wheel, and Zhejiang Wanfeng Auto Wheel which hold a combined 61.3% share of the aluminum wheel market. Most of wheel producers, restricted by production scale, technical strength, and brand recognition, fight for parts of low-end vehicle support market and aftermarket (including export market) by relying on low costs, at a disadvantage in competition in the whole industry.

China Automotive Wheel Industry Report, 2017-2021 focuses on the following:

- ◆ Overview of automotive wheel industry (definition & classification, development trends, industry policies, etc.);
- ◆ Automobile industry in China and the world (auto production, sales and ownership);
- ◆ Automotive wheel industry in China and the world (demand, regional analysis, support, import & export, etc.);
- ◆ Global and Chinese auto wheel market segments including steel wheel and aluminum wheel (market size, competitive landscape, development trends, etc.);
- ◆ Six international players (Iochpe-Maxion, CHUO SEIKI, ENKEI, SII, Borbet, RONAL), nine major domestic aluminum wheel enterprises (CITIC Dicastal, Lizhong Wheel, Zhejiang Jinfei Kaida Wheel, Zhejiang Wanfeng Auto Wheel, Zhejiang Yueling, Shanghai MingQi Aluminium Industry, Lioho Group, Donlinks Group) and five key local steel wheel manufacturers (Dongfeng Motor Wheel, Zhengxing Wheel, Changchun Faway Automobile Components, Xingmin Intelligent Transportation Systems (Group), Zhejiang Jingu) (profile, financials, main products, R&D, production base distribution, technical characteristics, etc.)

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