



**China NVH (System, Parts, Materials)
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

Automotive NVH parts can be divided into shock absorber and noise reduction products, of which the former covers rubber shock absorber and spring vibration damper, while the latter includes soundproof products and sealing products.

1) The Market of Rubber Shock Absorbers

With steady development of Chinese automobile industry, the market size of rubber shock absorbers grew as well. In 2016, the Chinese market size of rubber shock absorbers was approximately RMB21.367 billion, of which OEM accounted for 74.3% and AM 25.7%. In the next five years, the market size of rubber shock absorbers in China will still present steady growth, but with a slowdown in growth rate.

Currently, there are only around 50 manufacturers of automotive rubber shock absorber that have tapped into the passenger car OEM market, and a few of them are capable of synchronous R&D, system integration and batch supply. Some medium and high-end automotive rubber dampers still rely on imports from abroad. Nowadays, the local powerful companies mainly consist of Tuopu Group, Anhui Zhongding Sealing Parts, Zhuzhou Times New Material Technology, JX Zhao's Group Corp, and so forth.

2) The Market of Soundproof Products

In 2016, the market size of soundproof products in China reported RMB26.695 billion or so, including RMB24.4 billion from soundproof products for passenger cars. In the upcoming five years, the market size of soundproof products in China will surge to RMB32.395 billion in 2021, along with the steady development of Chinese automobile market.

So far, there have been over 100 producers of automotive soundproof products in China, and the key competitors involve Tuopu Group, Zhuzhou Times New Material Technology, Changshu Automotive Trim, Shanghai Car Carpet Plant, etc.

Tuopu Group is the leader in the market of vibration damper and soundproof products for OEM cars in China, with customers such as SAIC-GM, Geely, and Changan Ford. In 2016, the company's output and sales volume of rubber shock absorbers reached 4.0802 million sets and 3.8997 million sets, respectively; and output and sales volume of soundproof products was up to 1.9133 million sets and 1.7334 million sets, respectively.

From 2008 to 2016, Anhui Zhongding Sealing Parts successively acquired the leading players in the NVH industry like American AB, BRP, MRP, COOPER, ACUSHNET, German KACO, WEGU, TFH, French FM Seal, and Swiss Green Motion SA, and brought the upgrading of products into reality and explored the overseas market in a bid to further sharpen its competitiveness.

Zhuzhou Times New Material Technology accessed into the NVH field by acquiring German BOGE. In 2016, company's NVH business revenue reached RMB5.778 billion, up 9.8% year on year mainly because BOGE's new product plastic pedal case received large orders from Volkswagen and Porsche and active control vibration damper engine strut gained Audi's orders worth EUR6 million.

China NVH (System, Parts, Materials) Industry Report, 2017-2021 mainly highlights the following:

- ◆ Current situation, system integration, competitive landscape, development trend, etc. of Chinese automotive NVH market;
- ◆ Market size, competitive pattern, etc of NVH parts in China (rubber shock absorbers, soundproof products, sealing products);
- ◆ Upstream and downstream of Chinese NVH industry;
- ◆ 10 NVH companies (profile, operation, customers, NVH business, etc.)



1 Overview of NVH

- 1.1 Definition
- 1.2 Classification
- 1.3 Production Technology
 - 1.3.1 Shock Absorber Products
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