



**China Commercial Vehicle Exhaust  
Emission System Industry Report,  
2017-2021**

Oct. 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**

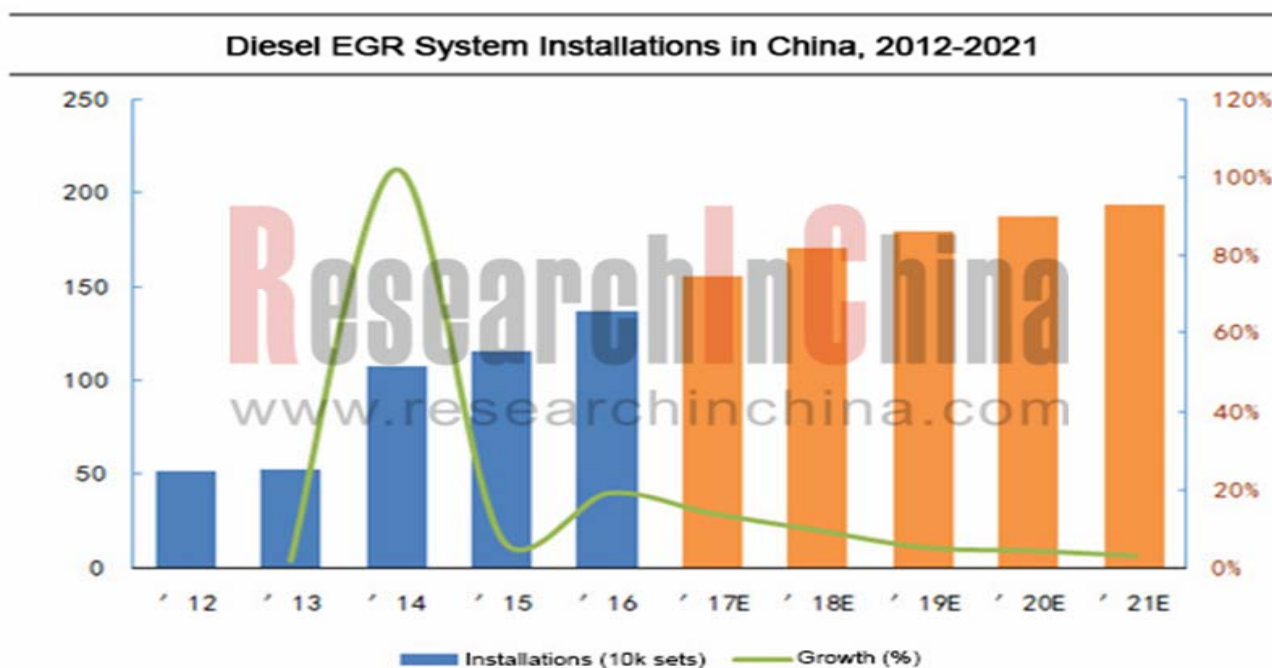
Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional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

Despite great controversy over the role of emission pollutants from motor vehicle in the haze across the country, the Chinese government has begun dealing with the source of pollution, putting the national Phase-5 pollutant emission standard for motor vehicle into effect on January 1, 2017. Increasingly stringent motor vehicle emission standards also drive rapid development of the vehicle exhaust after-treatment system sector. Take diesel EGR market for example, installations soared from 520,000 units in 2012 to 1.37 million units in 2016 in the Chinese diesel EGR market, and were expected to hit 1.94 million units in 2021, representing a CAGR of 7.21% between 2016 and 2021, as implementation of environmental policies is strengthened and the number of relevant exhaust treatment systems increases.



Source: China Commercial Vehicle Exhaust Emission System Industry Report, 2017-2021 Oct 2017

Under the backdrop of the implementation of National V emission standard and with overall consideration of technologies, costs and availability of associated products, China has primarily adopted European technology roadmap for its own diesel vehicles: SCR for medium and heavy commercial vehicles and EGR+DOC/POC for light commercial vehicles. 728,300 sets of SCR systems for medium and heavy commercial vehicles were installed in 2016, compared with 1.37 million sets of diesel EGR systems for light commercial vehicles, and 1.99 million sets of gasoline EGR systems.

The commercial exhaust emission system sector presents several distinct technological routes. In SCR field, local Chinese enterprises gain the upper hand with Wuxi Weifu Lida Catalytic Converter, Wuxi Kailong High Technology and Zhejiang Yinlun Machinery ranking from second to fourth with a market share of 21%, 15% and 9%, respectively, while Cummins (22%) taking the first place and Tenneco (8%) holding the fifth position. Wuxi Weifu Lida Catalytic Converter boasts excellent SCR technical competence with perfect R&D and production capabilities for core components except carriers in the whole industry chains. Cummins provides mature solutions to exhaust after-treatment systems covering engine emission control module, OBD module, vehicle urea-injection module and SCR catalyst module.

With regard to diesel EGR, Wuxi Longsheng Technology, BorgerWarner, Rheinmetall Automotive and Yibin TRD Auto Parts hold the lion's share, 31%, 30%, 24%, and 5% respectively. Wuxi Longsheng Technology provides a full range of products for EGR system including pneumatic and electric EGR valves meeting national emission standards, ECU suitable for off-road diesel engine, industry-leading tube-type and plate-fin EGR cooler, and supplementary pressure, temperature and gas sensors. BorgerWarner, a leader in the industry with a more complete product line for EGR system, developed an economical new series of exhaust gas recirculation (EGR) coolers featuring a compact floating core in 2017. The product enhances coolant distribution for durable performance even with minimum coolant flow, while reducing NOX emissions.

China Commercial Vehicle Exhaust Emission System Industry Report, 2017-2021 focuses on the followings:

- ◆ Development background, industry standards and policies, and major technological routes of commercial vehicle exhaust emission system industry;
- ◆ Development of SCR system and EGR system industries (system structure, market pattern, market size, and major carmakers supported);
- ◆ Development of downstream markets (commercial vehicle production and sales, bus and truck production and sales, as well as the prediction of production and sales volume);
- ◆ Nine major SCR system producers, six EGR system producers, and four POC/DOC catalyst producers in China (operation, related product business, latest developments, development in China (mainly foreign companies), and enterprises using relevant products, etc.)

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