



# China Automotive Shock Absorber Industry Report, 2018-2022

May 2018

## **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

Shock absorber, an essential part of automotive suspension system, can absorb body vibration and make driving more smooth and comfortable. The Chinese market demand for automotive shock absorber reached 225 million units in 2017, a year-on-year rise of 7.2%, and is expected to hit 318 million units in 2022 thanks to rapid expansion of the automobile (NEV in particular) market.

OEM market: the demand for automotive shock absorber has much bearing on China's automobile output. The country's car production rose by 3.2% from a year ago to 29.02 million units in 2017 and is expected to reach 34.55 million units in 2022, boosting the demand for automotive shock absorber from 116 million units in 2017 to 138 million units in 2022, presenting a CAGR of 3.6%.

After-sales maintenance market: massive car ownership creates a large after-sales market. An estimated 180 million shock absorbers will be needed in the Chinese automotive aftermarket in 2022.

Enterprise landscape: the key players in the Chinese shock absorber market include sole proprietorships or joint ventures of world-renowned shock absorber firms (ZF, Tenneco, KYB, Mando, SHOWA, ThyssenKrupp, etc.) and local Chinese peers (Nanyang Xijian Auto Shock Absorber, ADD Industry (Zhejiang), Chengdu Jiuding Science & Tech. and BeijingWest Industries, etc.).

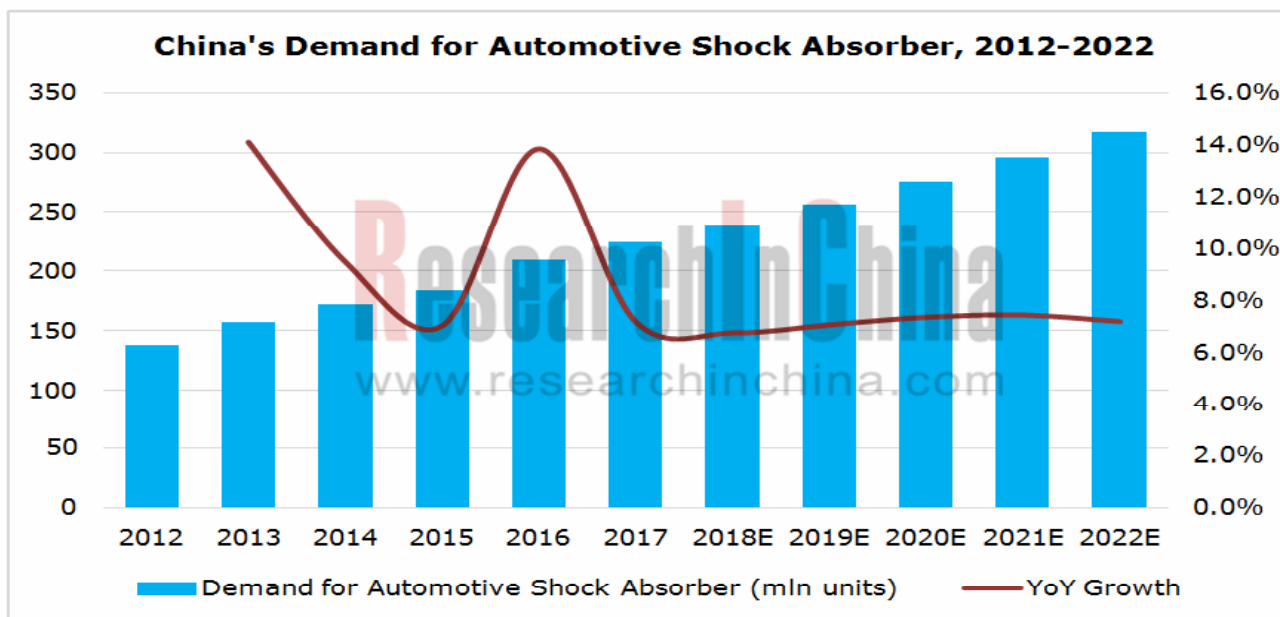
Attracted by China's enormous AM demand, global and local Chinese shock absorber producers have quickened their presence in shock absorber market. The Tenneco's new shock absorber project in Changzhou city, which began construction in Sept 2017, will be built at the end of 2018, adding 18 million units/a.

BeijingWest Industries, a joint venture of Shougang Group, has kept expanding its capacity worldwide since the acquisition of automotive suspension system business of US auto parts supplier- Delphi in 2009 and now is capable of producing 15.50 million shock absorbers annually. The company put its 4 million units/a new plant in Czech Republic into production in June 2017 and then began construction of a new plant in Indiana, U.S. which is expected to reach designed capacity (4 million units/a) in 2020.

Technically, there is an ever higher demanding on intelligence and comfort of shock absorber system. Adaptive adjustable shock absorber, compound shock absorber, intelligent shock absorber and electromagnetic-current shock absorber represent main development directions. Meanwhile, as the car becomes more lightweight, the lighter, smaller and higher-performance semi-active & active shock absorber systems will prevail.

China Automotive Shock Absorber Industry Report, 2018-2022 focuses on the followings:

- ◆ Policies on shock absorber and technical trends;
- ◆ Development and trends of global automobile market and Chinese passenger car, commercial vehicle and new energy vehicle (NEV) market;
- ◆ Chinese automotive shock absorber market (demand, OEM market, AM market, enterprise landscape, development trend, etc.);
- ◆ 18 Global and Chinese shock absorber manufacturers (operation, development strategy, etc.).



Source: China Automotive Shock Absorber Industry Report, 2018-2022

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