



China End-of-Life Vehicle (ELV) and Dismantling Industry Report,2018-2022

December 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

Automobile ownership has been climbing steadily in China over the recent years, at a CAGR of 15.2% between 2010 and 2017, and it will continue to rise in the upcoming five years, up to estimated 313.1 million units in 2022, despite a decline in both production and sales in 2018.

As automobile ownership increases in China, more vehicles are due to be scrapped. As estimated, there were a total of 7.3 million end-of-life vehicles (ELV) in China in 2017, with a scrap rate of 4%, but a mere 30% of them were recycled. In the first eleven months of 2018, 1.469 million ELVs were recycled in China, 15.1% more than in the same period of 2017, with the full-year recycling rate expectedly ranging at 20.0%.

Among 650 to 700 Chinese car dismantling firms for the moment, most are small sized with low annual recycling rate of ELV and scattered resources, though their dismantling networks already take shape. As yet, big players are Shenzhen GEM High-Tech, Jiangsu Huahong Technology, Miracle Automation, Henan Yuguang Gold & Lead, Tus-Sound Environmental Resources and Beijing Capital.

Despite China boasts a huge number of ELVs, its scrap rate remains far lower than the level of 6% to 8% in the developed countries, and a mere 0.5%-1% vehicles out of automobile ownership are recycled compared with a staggering 5%-7% in developed nations. That's largely because ELV subsidies are directly given to vehicle owners but in small amount, and professional dismantling firms buy their cars at a low price due to weak profitability, which leads to an influx of scrapped cars to the black market which offers a higher price.

The forthcoming new version of the Measures on Management of ELV Recycling, a policy allowing recycling and remanufacturing of "five automotive assemblies" (engine assembly, steering assembly, transmission assembly, front and rear axles, and frame), will promote market growth. With the subsequent issuance of related rules, the ELV and dismantling industry is hopefully to boom, with output value hitting RMB43.43 billion and recycling rate at 24.5% in 2022.

China End-of-Life Vehicle (ELV) and Dismantling Industry Report, 2018-2022 highlights the following:

- ◆ Global ELV and dismantling industry (overview, development in main countries, and typical companies);
- ◆ China renewable resource industry (policy, status quo, import and export, market segments, and forecast);
- ◆ China ELV and dismantling industry (policy, upstream sectors, overview, market size, competitive pattern, and summary and forecast);
- ◆ 14 Chinese ELV and dismantling firms (operation, gross margin, ELV business, and development strategy).

Main ELV and Dismantling Firms in China

	Layout
Shenzhen GEM High-Tech	<p>The company has constructed scrapped car processing bases in Jiangxi province and cities including Tianjin, Wuhan and Xiantao, forming a whole ELV resource industry chain of "recycling—dismantling—rough sorting—fine sorting—components remanufacturing". It also builds large waste resource trading markets in Jingmen City and Xiantao City of Hubei Province, securing raw materials supply for ELV business. In the first half of 2018, the company recorded RMB746.5 million in revenue from waste electrical and electronic equipment (WEEE) and ELV dismantling business.</p>
Jiangsu Huahong Technology	<p>The company has been a supplier of complete equipment for processing scrapped cars. In 2017, its car dismantling revenue reached RMB168.93 million. On August 9, 2018, the company acquired Beijing Zhongwubo Automobile Disassembling Co., Ltd. for RMB30 million in a bid to develop its ELV recycling and dismantling business.</p>
Miracle Automation	<p>The company's Recycling Division concentrates on the recycling and dismantling of ELV, the recycling of components, the utilization of crushed and sorted resources, the R&D and application of car dismantling equipment and technologies, and the online trade of remanufactured car components. Miracle Automation is sparing no efforts in construction of ELV recycling and dismantling bases and deployment of ELV recycling business. In the first half of 2018, the company put into use its ELV fine dismantling, automatic equipment (for efficient sorting) production project; the Recycling Division contributed the revenue of RMB677.5 million.</p>
Henan Yuguang Gold & Lead	<p>The company specializes in used battery recycling for scrapped car business, with a processing capacity of 540kt waste batteries a year. In 2017 its waste lead-acid battery recycling operation radiated out across Shaanxi, Shandong and Jiangsu from the existing areas like Henan, Sichuan, Zhejiang and Shanghai, adding 50 new partners and purchasing 176kt waste lead-acid battery metals and 35kt copper scraps.</p>
Tus-Sound Environmental Resources	<p>The company's scrapped car related subsidiaries include Hubei Sound Environmental Protection Co., Ltd., Xianning Xingyuan Renewable Resources Utilization Co., Ltd. and Hunan Sound Renewable Resources Co., Ltd.. Its ELV business, a part of its renewable resources recycling and utilization operation, brought in revenue of RMB1.014 billion in the first half of 2018.</p>
Beijing Capital	<p>The company's ELV dismantling center project covering an area of 33,600 m² and with total investment of roughly RMB92 million, was accepted by the authorities such as the Ministry of Commerce of the People's Republic of China in 2010, and went into operation in November 2010, being capable of dismantling over 50,000 units annually. In 2017, Beijing Capital earned RMB222.8 million from WEEE and ELV recycling and dismantling business.</p>

Source: ResearchInChina

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