



# Global and China Automotive Turbocharger Industry Report, 2019-2025

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## **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.

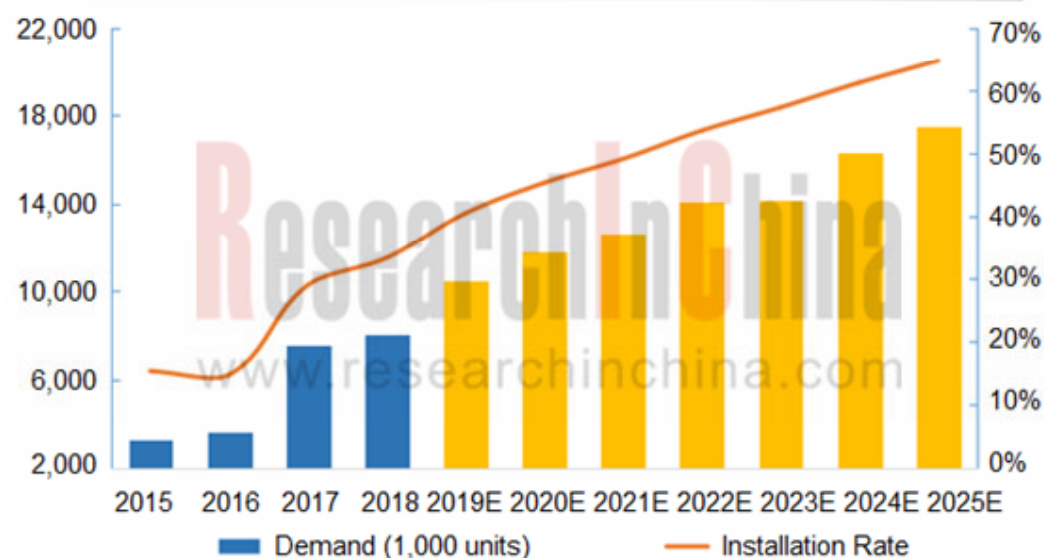
## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

With the increasingly serious problems like atmospheric pollution and high dependence on crude oil, energy conservation and emission reduction need to be implemented urgently. The automobile industry undoubtedly becomes one of target industries, and energy-saving and new energy vehicles will be the future development trend. The market size of automotive turbocharger, one of the most important technologies for energy saving and emission reduction of automobiles thanks to its energy efficiency and technology maturity, has been ballooning accordingly. In 2018, the demand for automotive turbochargers in China rose 7.1% year on year to 8.045 million units, and the installation rate reached 33.29%. With the continuous upgrading and implementation of China's emission standards, automotive energy conservation and emission reduction will remain a major concern in the near future. Countries have set the timetable for phasing out internal combustion engines, but most of them are not legally effective. What's more, the supportive projects for new energy vehicle will still take time. In short, the upgrade of traditional power technology will still be the mainstream in the next decade, and the turbocharged market will show enormous development potentials.

Market Size and Installation Rate of Automotive Turbochargers in China, 2015-2025E



Source: Global and China Automotive Turbocharger Industry Report, 2019-2025 March 2019 ResearchInChina 中国汽车涡轮增压器研究中心

From the perspective of market segments, Chinese automotive turbochargers are mainly divided into gasoline turbochargers and diesel turbochargers. Due to different fuel combustion efficiency, the installation rate of diesel turbochargers has been much higher than that of gasoline turbochargers, for instance, the former hit 76.3% while the latter was only 27.7% in 2018. In future, gasoline turbocharger will see a fleetly growing installation rate, expectedly reaching 62.4% in 2023 given stricter environmental requirements.

In competition, international turbocharger giants Garrett Motion (a spin-off from Honeywell in 2018), BorgWarner, MHI and IHI have almost monopolized Chinese gasoline turbocharger market as the operating speed and temperature of gasoline turbochargers require high-quality materials and processing technology. It is difficult for Chinese players to break the foreign monopoly in the short run, because they lack high-end innovation in the design and development of core turbocharger components (such as compressors and turbines), the reliability of their products desires to be much improved, and they forayed into the field late. Only Ningbo Vofonturbo and Hunan Tyen Machinery can support low-end vehicle models of Chinese automakers. As for diesel turbochargers, the world-renowned suppliers of commercial vehicle turbocharger consist mainly of Garrett Motion and Cummins, both of which seize handsome shares in the Chinese market, especially for high-end vehicle models. Chinese competitors such as Hunan Tyen Machinery, Kangyue Technology, FuYuan Turbochargers and Weifu Tianli target the medium & low-end commercial vehicle market and the construction machinery market.

Global and China Automotive Turbocharger Industry Report, 2019-2025 by ResearchInChina highlights the following:

- ◆ Overview of the automotive turbocharger industry (including definition and classification, technical characteristics, development trends, industrial policies, etc.);
- ◆ Overview of global and China automotive industry (automobile output, etc.);
- ◆ Market size, competitive landscape, etc. of global turbochargers;
- ◆ Market size, demand structure, automaker layout, etc. of Chinese turbochargers, especially automotive turbochargers;
- ◆ Demand for diesel and gasoline engine turbochargers in China;
- ◆ Operation, turbocharger business, development in China, etc. of eight global turbocharger manufacturers;
- ◆ Operation, turbocharger business, R&D, development strategy, etc. of eight Chinese turbocharger manufacturers.

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