Global and China Automotive Radiator 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

As an essential part of an automobile, the radiator's demand hinges on growth of the automotive sector. In 2018, output and sales of automobiles in China declined by 4.2% and 2.8% from a year earlier to 27.809 million units and 28.081 million units, respectively, causing a year-on-year decrease of 4.2% in the demand for radiators to hit 27.809 million units with the market size of roughly RMB4,026 million, all of which arose from preferential purchase tax policy cancellation, macro-economy slowdown, China-US trade war and weaker consumer confidence, according to the data from China Association of Automobile Manufacturers (CAAM). It is expected that the sales drop of automobiles will be accompanied by less demand for radiators in China whilst the radiator prices are declining. Chinese radiator market will be worth RMB3,857 million and 30.21 million units will be demanded in 2025.

Automotive radiators are used in compact vehicles (including passenger cars and small/mini commercial vehicles), medium and large commercial vehicles and new energy vehicles. Market size of the three types of radiators reached RMB2,966 million, RMB753 million and RMB308 million in 2018, respectively, and are projected to be RMB2,510 million, RMB615 million and RM1,014 million in 2025, among which only those for new energy vehicles will rise.

The boom of new energy vehicles gives a boost to the radiator segment where the CAGR will range at 18.6% from 2018 to 2025. New energy vehicle radiator system is a new component designed to cool motor instead of engine that is the case in conventional fuel vehicle. Traditional thermal management system suppliers still remain superior in some technology areas, but some late entrants stand a chance of making breakthroughs in product, technology and brand.

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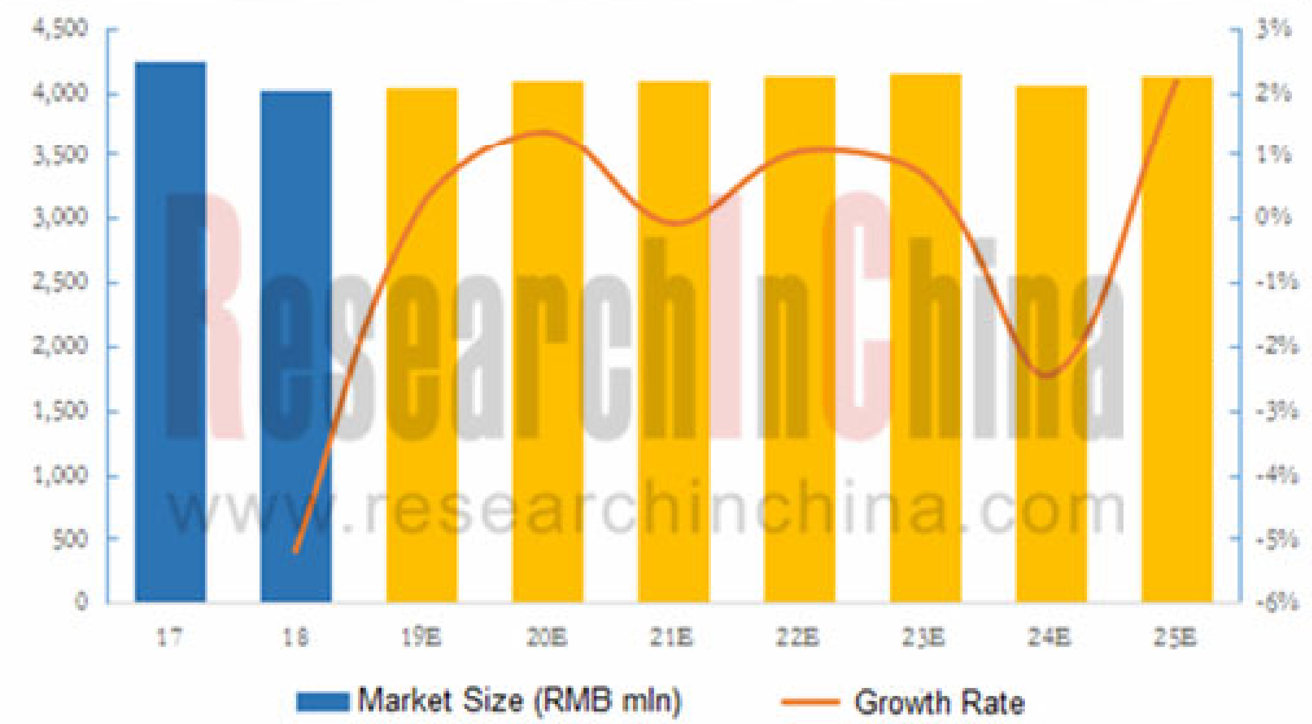
Automotive Radiator Market Size and Growth Rate in China, 2017-2025E



Source: Global and China Automotive Radiator Industry Report, 2019-2025 May 2019 ResearchInChina

In China, joint venture OEMs and local Chinese automakers have established own parts supply systems, or set up radiator branches or subsidiaries as their fixed suppliers. In contrast, only by superiorities in technology, quality and cost can external professional radiator vendors become the qualified suppliers. World-renowned automotive radiator companies have built factories independently or together with others in China. Examples include Behr, T.RAD, Denso, Modine, Valeo and Hanon. There are approximately 30 foreign-funded companies (including Sino-foreign joint ventures, cooperative businesses, and wholly foreign-owned enterprises) established in China, and they command much of the passenger car market because of fixed supply relationships with automakers; Chinese brands such as Zhejiang Yinlun Machinery Co., Ltd., Weifang Hengan Radiator Group Co., Ltd., Ningbo Lurun Cooler Manufacturing Co., Ltd. and Nanning Baling Technology Co., Ltd. are edging their way into OEM market with constant efforts, especially supply systems of homegrown automakers in the commercial vehicle field in which they have won a place.

The followings are highlighted in this report:

- Automotive radiator (definition, classification, technical features, development trends, etc.);
- Global and China's automobile production and sales as well as the output and sales volume of segmented products;
- Global and China automotive radiator market (environment, size, competitive landscape);
- Automotive radiator market segments in China;
- Technical features, market size and so forth of new energy vehicle radiators in China;
- 7 global automotive radiator manufacturers (operation, technical characteristics of their radiators, supply, development in China, among others);
- 9 Chinese automotive radiator producers (operation, characteristics of their radiators, R&D, development strategy, etc.).

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