



Global and China Automotive Exhaust System Industry Report, 2013

Dec. 2013

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

Global and China Automotive Exhaust System Industry Report, 2013 contains the following:

1. Overview of global automotive market
2. Overview of Chinese automotive market
3. Introduction to automotive exhaust system and future development trends
4. Research on automotive exhaust system industry
5. Research on 13 major automotive exhaust system vendors, three substrate companies and seven catalyst enterprises

The global automotive exhaust system market size approximated USD 31.7 billion in 2013, only a slight increase of 1.3% year on year, mainly due to the EU market downturn, Japanese yen devaluation and China's delay of Emission Standard IV for diesel vehicles. However, as emission standards become more and more stringent, the market size of exhaust systems, especially those for diesel vehicles, will grow steadily, and is expected to rise by 4.1% to USD 33 billion in 2014.

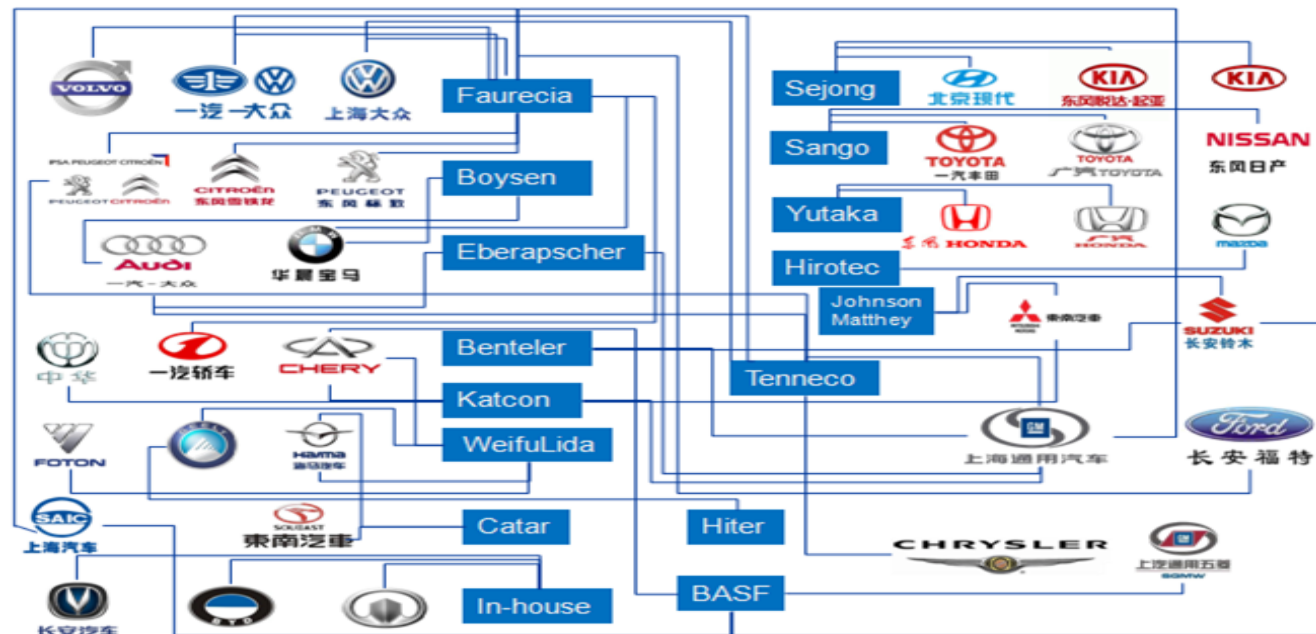
The much-anticipated Chinese market for the fourth time delayed the implementation of Emission Standard IV which was initially announced by the government in May 2005 to be effective on January 1, 2011. The implementation was rescheduled in January 2012 to take effect on July 1, 2013, which was failed too, and now is expected to be postponed to July 2014 at the earliest.

Many foreign agencies believe that the SCR technology corresponding to China's Emission Standard IV may not be promoted in China. For Chinese manufacturers, SCR is unacceptable because of the growing one-time procurement amount and, most importantly, the significant increase in operating costs. In order to make diesel vehicles comply with Emission Standard IV, it's necessary to add the automotive urea solution equivalent to 4%-6% of diesel consumption, and the cost of urea solution is nearly RMB 5 / liter, which means about RMB 20 of urea per 100 km, greatly increasing the follow-up operating costs of vehicles.

Currently, Sinopec's automotive urea solution filling stations in China are operating at a loss. In the short term, barreled urea solution will still occupy the mainstream market, but it has high requirements on storage and transportation, therefore, it's difficult for domestic Emission Standard IV-compliant vehicle users to refuel urea solution conveniently. Truck drivers' use of urea solution is uncontrollable, they can only use urea solution in annual vehicle inspection or examination, which means the insignificance of SCR even it's available. The government is well aware of this, so China is energetically promoting EGR, especially for diesel vehicles under 2L. There is no position for SCR on the market.

Exhaust System Suppliers of China's Major Sedan Companies

中国主要轿车厂家排气系统供应商配套图



In addition, the quality of China's oil products is poor, Sinopec, China's largest oil refinery, has just completed the upgrading of Standard III diesel, and has no schedule for Standard IV. Most EGR-enabled engines cannot use Standard III diesel which may do harm to the engines. Currently, China needs to import Standard IV diesel from other countries and regions.

Automotive exhaust systems available in China can be divided into European, American, Japanese, South Korean and local ones.

- ✘ European companies include Faurecia, Boysen and Eberspacher, Faurecia sweeps most of the medium and low-end European vehicles, including FAW VW, SVW, DCAD, DPAD, SGM, medium and low-end models of BMW and Mercedes-Benz, while high-end vehicle models are shared by Boysen and Eberspacher.
- ✘ American companies include Tenneco and Katcon, mainly serving SGM. Joint ventures of Tenneco and Eberspacher occupy some medium and high-end vehicle models of FAW.
- ✘ Japanese companies include Sango, Futaba, Yutaka, Hirotec, Aisan and Clasonic. Sango and Futaba mainly serve Toyota, Yutaka supplies Honda, Hirotec for MAZDA, and Clasonic for Nissan.
- ✘ Sejong is the only South Korean company, monopolizing all models of Hyundai.
- ✘ Local companies take two ways, one is in-house, such as Chongqing Chang'an, BYD and Great Wall Motor; the other is through specialized enterprises, mainly including Wuxi Weifu Lida Catalytic Converter, Chongqing HITER Automotive Exhaust System, and Tianjin CATARC Auto Tech. In the field of commercial vehicles, local manufacturers and catalyst companies occupy a leading position, Shanghai BASF, Suzhou Umicore, Wuxi Weifu Lida Catalytic Converter and Sino-Platinum Metals take up most of the market.

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