



China Automobile Axle Market Report, 2014-2017

Oct. 2014

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

China Automobile Axle Market Report, 2014-2017 predicts that sales volume of axle in China during 2014-2017 will register a CAGR of 6%, and will reach 15.67 million sets by 2017. As a key auto part, the development of axle industry is closely related to that of entire automobile industry, notably commercial vehicle industry. In 2013, commercial vehicle output in China rose 7.46%, and axle market grew steadily, with annual sales volume amounting to 12.48 million sets, up 10.23% year on year.

From market segments, heavy-duty truck chassis output in China soared 22% in 2013, which drove sale volume of heavy-duty axle up 21%. It is expected that growth rate of heavy-duty axle will be slowed by decelerated growth of heavy-duty truck market, as China restructures its macro-economy. In 2013, light axle expanded by 9%, and is expect to maintain rapid growth rate in the next couple years, driven by new energy bus and SUV, with average annual growth rate staying around 8% during 2014-2017.

Market Share of Major Axle Companies in China, 2013-2014

Unit: 1000 sets	2013		2014E	
	Sales Volume	Market Share	Sales Volume	Market Share
China Changan Automobile Group	2,099	16.82%	2,413	18.20%
Sichuan Jian'an Axle Branch Company				
Zhucheng Yihe Axles Co., Ltd.	909	7.29%	937	7.07%
Tianjin Fengjin Auto Parts Co., Ltd.	798	6.40%	911	6.87%
Jiangxi Jiangling Chassis Co., Ltd.	378	3.03%	447	3.37%
Dongfeng Dana Axle Co., Ltd.	371	2.97%	334	2.52%
Hunan Zoomlion Axle Co. Ltd.	330	2.64%	325	2.45%
China National Heavy Duty Truck Group				
Jinan Axle & Transmission Co., Ltd.	268	2.15%	263	1.98%
Chongche Group Shenyang Automobile Axle Manufacturing Co., Ltd.	176	1.41%	192	1.45%
Tianjin Coach-axle Co., Ltd	160	1.28%	144	1.09%
Hubei Sanzhong Axle Co., Ltd.	138	1.11%	145	1.09%
Anhui Ankai Futian Shuguang Axle Co., Ltd.	94	0.75%	89	0.67%

Source: CAAM; ResearchInChina

From market landscape, the concentration ratio of China's axle market is relatively high, with 36% of the market occupied by top five companies by sales volume in 2013, namely, Sichuan Jian'an Rear Axle Automobile Co., Ltd., Zhucheng Yihe Axles Co., Ltd., Tianjin Fengjin Auto Parts Co., Ltd., Jiangxi Jiangling Chassis Co., Ltd. and Dongfeng Dana Axle Co., Ltd.

- In front axle assembly market, major companies include Tianjin Fengjin Auto Parts Co., Ltd., Dongfeng Dana Axle Co., Ltd. and T Tianjin Coach-axle Co., Ltd, together holding about 20% of the market segment.
- In rear axle assembly market, China Changan Automobile Group Sichuan Jian'an Axle Branch Company distinguishes itself from others with a market share of 24.4%, surpassing the share of the following seven companies combined.

China Automobile Axle Market Report, 2014-2017 includes 7 chapters and 120 charts, involving the following:

- Overview of axle industry (mainly including macro-economic condition and relevant policies)
- Axle-related industries (including status quo and development trend of the complete vehicle and parts industries)
- China's axle market (embracing market size, supporting relationship of major companies, sales volume forecast for 2014-2017)
- Axle import and export market (including import and export volume and value of drive axle and dead axle)
- Competitive landscape in market segments (ranking of companies by sales volume and market share in front and rear axle, axle and half axle markets)
- Operation of 15 Chinese companies and 4 foreign axle producers (covering profile, financial index, revenue structure, ranking, market share, major customers and operating performance forecast)

1. Overview of Automobile Axle Industry

1.1 Definition and Classification

1.1.1 Definition

1.1.2 Classification

1.2 Relevant Policies

2. Automobile Axle-related Industries

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2.2.3 Market Size

2.2.4 Development Trend

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3.2.3 Corporate Capacity and Supporting Relationship

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3.3.1 Market Size

3.3.2 Corporate Capacity and Supporting Relationship

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7.9 Tianjin Fengjin Auto Parts Co., Ltd.

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