

Indian Auto-Components Industry Outlook: Edition 2012 - Focus on Automotive Chains' OEM and Replacement Market

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Abstracts

Executive Summary

The report titled “Indian Auto-Components Industry Outlook: Edition 2012 – Focus on Automotive Chains’ OEM and Replacement Market” focuses on several growth aspects of the industry and various factors which pose challenges. The report entails the market size of the transmission chain market and detailed analysis on OEM and Replacement segment. The report also covers the market share of the two largest players i.e. Rolon and TI-Diamond in automotive transmission chain market.

The automobile industry in India is one of the fastest growing industries in the world with over ~ million units of increase in the automobile production in FY’2011. The industry produced over ~ million vehicles and exported around ~ million units in FY’2011. The two wheelers segment dominated the automobile market with the market share of ~% in the total automobile production. The number of two-wheelers sold in India increased to ~ units in FY’2011 as compared to ~ units in FY’2006.

In FY’2011, the auto components sector in India registered a strong growth rate of ~% as compared to 30.6% growth rate in FY’2010. The revenue growth in the domestic automotive component market of USD ~ billion (INR ~ crore) can be attributed to the reduction in excise duties on certain vehicles and the grant of 100% foreign investment in the component sector. There were around ~ auto component manufacturers in the organized segment and around ~ players in the unorganized automotive component market in India

The automotive chain market in India is relatively dependent on the behavior of the two-

wheeler market and roads conditions in the country. The industry has showcased moderate OEM growth and an exponential replacement segment growth largely trading on the back dated OEM growth and the reduced life of the transmission chains due to Indian road conditions. The transmission chains market has inclined at a CAGR of 14.8% from the period FY'2006-FY'2011. The sales of automotive transmission chains in FY'2011 have increased to USD ~ million (INR ~ crore) from USD ~ million (INR ~ crore) in FY'2006.

The transmission chain market in India is majorly dominated by the OEMs with ~ market share in FY'2011. The replacement market is highly price competitive with the presence of 3 domestic players and several unorganized manufactures. In FY'2011, drive chains accounted for around ~% of the total replacement transmission chains sales while cam chains contributed around ~% of the replacement chains market in the same fiscal year.

The Indian transmission chain market is concentrated amongst few players such as LG Balakrishnan and TIDC. LG Balakrishnan is the largest transmission chain manufacturer and distributor in India. The company's transmission chain brand Rolon accounted for around ~% of the total transmission chain market in India in FY'2011. TIDC is the second largest player in the market with its brand Diamond. The company in FY'2011 has around ~% market share in India. The company has a strong distribution network of around ~ dealers and ~ warehouses across the country.

The future prospects of the automotive transmission chain market in India are quite promising as the two-wheelers production and investment will increase in the coming year. The OEM segment will continue to maintain its dominance in the market in India with moderate growth given the past track record of 2 decades. Replacement transmission chain segment, on the other hand, will poise to achieve significant growth in coming years on the grounds of two wheelers industry growth of 25% and 27% respectively in FY'2010 and FY'2011.

Key Topics Covered in the Report:

Indian automobile – passenger vehicles, commercial vehicles, three wheelers and two wheelers production and sales, 2006-2011

Market size and segmentation of Indian auto component Industry, 2006-2011

Market size of Indian automotive transmission chain market, 2006-2011

Market segmentation of transmission chain market on the basis of OEMs and Aftermarket/ Replacement market, 2011

Market Segmentation of replacement transmission chain market on the basis of drive chains and cam chains, 2011

Market segmentation of transmission chain market on the basis of OEMs and Aftermarket/ Replacement market, 2011

Trends and development in Indian transmission chains market

Competitive landscape and a detailed company profile of the major producers of transmission chains in India along with SWOT Analysis

Future outlook and projections of Indian transmission chains, 20012-2016

Industry Factors affecting the transmission chain market such as personal disposable income, two wheelers sales, finished steel consumption and auto-components market in India, 2006-2016

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