

China Automotive Seal Industry Report, 2015-2018

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Abstracts

Tightness is an important indicator to measure the quality of the vehicle, and sealing system is also one of the most widely used parts in automobile. The sealing system primarily plays a role in filling the gap, absorbing and reducing vibration, deadening the noise, providing a route for mobile parts, and making up the errors in metal plate fabrication and assembly.

The excellent durability and longer service life of automotive weatherstrip makes a relatively small after-sales maintenance market, and the demand is mainly concentrated in complete vehicle supporting field. In 2014, China produced 23.72 million vehicles. Calculated on the basis of around 45-meter weatherstrip for a car, about 1.067 billion meters of automotive weatherstrip would be needed. China's demand for automotive weatherstrip in 2015 is negatively affected by slower growth in new car sales and expected to go up 2%-3% year on year.

As to competitive landscape, automotive seal manufacturers are mainly joint ventures or sole-investor enterprises set up by a dozen auto groups, resulting in a relatively stable pattern of supply and demand.

Local Chinese automotive weatherstrip companies support mainly homegrown brands and small-displacement models, while most joint-venture brands and high-end auto models prefer weatherstrip from large multinational auto parts companies. In 2014, domestic Chinese seal companies seized about 45% market share and joint ventures & foreign companies the remaining 55%. It is noteworthy that some local seal players are gradually entering the supply chain of JV and high-end automakers via overseas M&As and technological improvement, such as Anhui Zhongding Sealing Parts, Guizhou Guihang Automotive Components, and Minth Group, with the first having become a supplier of high-end seals (including the ones for EV and new energy vehicles) through active overseas M&As.

China Automotive Seal Industry Report, 2015-2018 highlights the followings:

Overview of automotive seal industry in China, including definition & classification of product, characteristics of product and process, main policies, etc.;

Overview of automobile and parts industry in China, covering output & sales of different categories of automobiles, competitive landscape, market size of main parts, etc.;

Overview of automotive seal industry in China, including market size, competitive landscape, supporting relationship, industry forecast, etc.;

Analysis of 6 multinational companies (Cooper-Standard, Henniges Automotive, Toyoda Gosei, Kinugawa, Nishikawa Rubber, Hwaseung R&A) and 12 domestic counterparts including Anhui Zhongding Sealing Parts, Guizhou Guihang Automotive Components, Minth Group, Jiangyin Haida Rubber and Plastic, Jianxin Zhao's Group Corp, Guizhou Jingzhong Rubber & Plastic Industry, and Chongqing Jiaxuan Automobile Sealings, containing profile, financial position, main products, R&D, production bases, technical features, etc.

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