

China Three-way Catalytic Converter Industry Report, 2014

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Abstracts

Three-way catalysis refers to the catalysis that converts harmful gases including CO, HC and NO_x from automobile exhaust into harmless carbon dioxide, water and nitrogen via oxidization and reduction, mainly with a three-way catalytic converter, which is carried by a porous ceramic material and mounted on a special exhaust pipe. The reason it is called carrier is that it itself does not participate in catalytic reaction, but is covered with a layer of platinum, rhodium, palladium and other precious metals, and is the most important purification device outside the machine installed in an automobile exhaust system.

Chinese three-way catalytic converters for passenger cars are mainly divided into two parts, i.e. new demand and replacement demand. From the measured historical data, 2014 is the milestone year for three-way catalytic converter demand. Prior to that, the new demand, influenced by a large base of new cars and still not a replacement tide for three-way catalytic converter, had been significantly higher than the replacement demand, e.g. 17.93 million and 15 million respectively in 2013. However, the replacement demand (20.02 million) exceeded the new demand (19.92 million) in 2014. In the future, with a slowdown in domestic automobile production and sales and the arrival of peak demand for replacing automotive three-way catalytic converters, China's three-way catalytic converter and industry chain parts will be beneficiaries.

With regard to catalyst, 26.41 million liters were needed by passenger cars in 2014, of which, over 80% were provided by foreign companies and the remaining 20% by domestic Chinese peers. According to China Internal Combustion Engine Industry Association, as of 2013, all catalysts for joint-venture passenger cars were made by foreign companies, and even for independent brand passenger cars, only 55% of catalysts thereof came from domestic companies.

As far as catalyst encapsulation is concerned, the main market is still dominated by foreign-funded or joint-venture enterprises represented by Faurecia and Tenneco which mainly occupy the middle and high-end market and support joint-venture vehicle manufacturers. Wuxi Weifu Lida Catalytic Converter Co., Ltd., a large-scale domestic manufacturer of automobile exhaust purifier, mainly supports self-owned brands.

The report highlights the followings:

Overview of three-way catalytic converter, including definition, structure, industry policies, etc.

Global three-way catalytic converter market demand, including global automobile production and sales, demand estimation, etc.;

China's three-way catalytic converter market demand, consisting of the development status, competition pattern, market demand, etc. of China's automobile industry;

18 manufacturers in three-way catalytic converter industry chain e.g. Implats, Kunming Sino-Platinum Metals, Heraeu, Cataler, BASF, Johnson-Matthey, Tianjin HySci Company, involving their revenue, net income, revenue structure, production base, catalyst business, etc.

Contents

1. DEFINITION OF THREE-WAY CATALYST (TWC)

- 1.1 Definition
- 1.2 Composition and Structure
 - 1.2.1 PGM
 - 1.2.2 Catalyst
 - 1.2.3 Ceramic Substrate
 - 1.2.4 Liner
 - 1.2.5 Sensor

2. GLOBAL TWC MARKET SIZE

- 2.1 Overview of Global Automobile Industry
- 2.2 Global TWC Market Size

3. CHINESE TWC MARKET SIZE

- 3.1 Automobile Overview
 - 3.1.1 Automobile Market
 - 3.1.2 Passenger Car Market and Market Segments
 - 3.1.3 Commercial Vehicle Market and Market Segments
- 3.2 Policies
- 3.3 TWC Market Size
- 3.4 Competition Pattern
- 3.5 Driving Factors of Catalytic Converter

4.PGM

- 4.1 Implats
 - 4.1.1 Profile
 - 4.1.2 Platinum Production and Sales
 - 4.1.3 Operation
 - 4.1.4 Development Planning

4. 2 KUNMING SINO-PLATINUM METALS

- 4.2.1 Profile

- 4.2.2 Operation
- 4.2.3 By Product / Region
- 4.2.4 Gross Margin
- 4.2.5 R&D
- 4.2.6 Automotive Catalyst
- 4.2.7 Development Planning
- 4.3 Heraeus
 - 4.3.1 Profile
 - 4.3.2 Operation
 - 4.3.3 Catalyst Business

5. TWC

- 5.1 Cataler
 - 5.1.1 Profile
 - 5.1.2 Major Clients and Production Bases
 - 5.1.3 Cataler (Wuxi) Automotive Environment Technology Co., Ltd. [CCC]
- 5.2 BASF
 - 5.2.1 Profile
 - 5.2.2 Catalyst Business
- 5.3 Umicore (acquired Delphi's automotive catalyst business in 2007)
 - 5.3.1 Profile
 - 5.3.2 Operation
 - 5.3.3 Umicore Automotive Catalysts (Suzhou) Co., Ltd.
- 5.4 Johnson-Matthey
 - 5.4.1 Profile
 - 5.4.2 Operation
 - 5.4.3 Johnson Matthey Shanghai Chemicals Ltd.
- 5.5 Tianjin HySci Company
- 5.6 Daiichi Kigenso Kagaku Kogyo Co., Ltd.
 - 5.6.1 Profile
 - 5.6.2 Operation
 - 5.6.3 Catalyst Business

6. SUBSTRATE

- 6.1 Corning (Shanghai) Co., Ltd.
 - 6.1.1 Profile
 - 6.1.2 Operation

- 6.1.3 Corning (Shanghai) Co., Ltd.
- 6.2 NGK Insulators
 - 6.2.1 Profile
 - 6.2.2 Operation
 - 6.2.3 NGK Insulators (Suzhou)
- 6.3 Ividen
 - 6.3.1 Profile
 - 6.3.2 Operation
- 6.4 Jiangsu Province Yixing Nonmetallic Chemical Machinery Factory Co., Ltd.
- 6.5 Nanjing Kerui Special Ceramics Company Limited (a subsidiary of Gaochun Ceramics)
- 6.6 Weihai Pacific Industrial Development Corporation (PIDC), China

7. GASKET

- 7.1 3M (China) Co., Ltd.
- 7.2 Zhejiang Bondlye Motor Environmental Technology
- 7.3 Unifrax (Shanghai)

8. SENSOR COMPANIES

- 8.1 Bosch
 - 8.1.1 Profile
 - 8.1.2 Operation
 - 8.1.3 Oxygen Sensor Business
- 8.2 Delphi
 - 8.2.1 Profile
 - 8.2.2 Operation
 - 8.2.3 Oxygen Sensor Business
- 8.3 Denso
 - 8.3.1 Profile
 - 8.3.2 Operation
- 8.4 NGK
 - 8.4.1 Global Sensor Production Base
 - 8.4.2 NGK Spark Plug (Shanghai) Co., Ltd.
- 8.5 Kefico
 - 8.5.1 Profile
 - 8.5.2 Main Products
 - 8.5.3 Operation

8.6 UAES

9. LEADING TWC INTEGRATED MANUFACTURERS

9.1 Faurecia

9.1.1 Profile

9.1.2 Operation

9.1.3 Revenue Structure

9.1.4 R & D

9.1.5 Performance in China

9.1.6 Major Supporting Models

9.1.7 Faurecia (Changchun) Exhaust System Co., Ltd

9.1.8 Shanghai Faurecia Honghu Exhaust System

9.1.9 Wuhan Faurecia Tongda Exhaust System

9.1.10 Faurecia Exhaust System Qingdao

9.1.11 Faurecia Exhaust System Chengdu

9.1.12 Faurecia Exhaust System Chongqing

9.1.13 Faurecia Exhaust System (Ningbo Hangzhou Bay New Zone)

9.2 TENNECO

9.2.1 Profile

9.2.2 Financial Data

9.2.3 Business in China

9.2.4 Major Clients in China

9.2.5 TENNECO's Major Supporting Models in China

9.2.6 Shanghai Tenneco Exhaust System Co. Ltd.

9.2.7 Tenneco Tongtai (Dalian) Exhaust System Co., Ltd.

9.2.8 Tenneco-Eberspaech (Dalian) Exhaust System Co., Ltd.

9.2.9 Tenneco Lingchuan (Chongqing) Exhaust System Co., Ltd.

9.3 J. Eberspaecher GmbH & Co. KG

9.3.1 Profile

9.3.2 Financial Data

9.3.3 Production Base

9.3.4 Major Supporting Models

9.3.5 R & D Costs

9.3.6 Eberspaecher Exhaust Technology (Shanghai) Co., Ltd.

9.3.7 Tenneco-Eberspaech (Dalian) Exhaust System Co., Ltd. (see 9.2.8)

9.3.8 Eberspaech Exhaust Technology (Xi'an) Co., Ltd.

9.4 Weifu Group

9.4.1 Profile

9.4.2 Financials

9.4.3 Exhaust Gas After-treatment System

Selected Charts

SELECTED CHARTS

Main Structure of Catalytic Converter

Average Prices of Exhaust Systems of Gasoline Engine and Diesel Engine, 2009 & 2014

Global TWC Market Size, 2013-2018E

Number of Automobile Makers and YoY Growth in China, 2003-2014

Revenue and YoY Growth of China's Automobile Manufacturing Industry, 2003-2014

Total Profit and YoY Growth of China's Automobile Manufacturing Industry, 2003-2014

Gross Margin of China's Automobile Manufacturing Industry, 2003-2014

Chinese TWC Market Size, 2012-2014

China's Demand of TWC, 2009-2018E

Implementation of National Standards for Pollutant Emission of Motor Vehicle

Ownership Structure of Implats

Mining Production of Implats, 2014

Financial Data of Implats, 2010-2014

Financial Data of Implats by Product, 2010-2014

Employees of Sino-Platinum Metals, 2010-2014

Gross Margin and Net Profit Margin of Sino-Platinum Metals, 2010-2014

Gross Margin of Sino-Platinum Metals by Product, 2010-2014

R&D Costs and % of Total Revenue of Sino-Platinum Metals, 2010-2013

Revenue of Heraeus, 2009-2013

Revenue Structure of Heraeus by Region, 2009-2013

Revenue from Metal Products of Heraeus, 2009-2013

Cataler's Overseas Production Bases

Cataler's Revenue, FY2002 -FY2014

BASF's Global Mobile Emissions catalysts Capacity Expansion, 2011-2014

Umicore's organization structure

Global Distribution of Umicore's Automotive Catalyst Business

Umicore's Layout in China

Revenue of Johnson-Matthey, 2013-2014

Revenue of Emission Control Technologies, 2014H1

Johnson Matthey's Light Duty Catalyst Sales, 2014H1

Johnson Matthey's Heavy Duty Diesel Catalyst Sales of 2014H1

Johnson Matthey's Total R&D Costs and Segment R&D Spending Percentage, 2012-2014

Market Position of Johnson Matthey's LDV Catalyst

DKKK's Revenue, FY2013-FY2015
DKKK's Operating Income and Operating Margin, FY2013-FY2015
DKKK's Main Factories
DKKK's Revenue from Catalyst, FY2014
Corning's Product Application
Carrier/Filter Plants around the Globe
NGK's Production Bases Worldwide
Revenue and Operating Margin of NGK, FY2007-FY2014
Revenue of NGK by Division, FY2007-FY2014
NGK's Performance, FY2015E
Capital Expenditures of NGK by Division, FY2010-FY2014
Revenue and Operating Margin of NGK's Ceramics Division, FY2008-FY2014
Revenue of NGK's Ceramics Division by Product, FY2012-FY2014
Revenue of NGK's Ceramics Division by Product, FY2004-FY2015
Ibiden's Revenue by Segment, FY2014
Ibiden's DpFs Revenue, 2011-2015
Main Sales Territories of Coral Ceramics

3M'S REGIONAL SALES, 2011-2013

3M'S FINANCIAL REVENUE, 2010-2014

3M'S SALES BY DIVISION, 2013-2014

Bosch's Number of Employees, 2009-2013
Bosch's Revenue Structure Division, 2012-2013
Sales & EBIT of Bosch's Automotive Division, 2012-2013
Bosch's Revenue Structure by Region, 2012-2013
Delphi's Number of Employees, 2011-2013
Delphi's Revenue, Net Income and Gross Margin, 2010-2013
Delphi's Top 5 Clients and Revenue Contribution, 2012-2013
Name List and Revenue Contribution of Top5 Clients of Delphi, 2012-2013
Delphi's Oxygen Sensor Production Bases
Number of DENSO Employee, FY 2009-FY2013
Denso's Sales and Profit, FY2013-FY2015
Denso's Operation Profit and Net Income, FY2011-FY2015
Revenue Structure of Denso by Division, FY2011-FY2015Q1
Sales and Operation Profit of DENSO by Region, FY2013-FY2015
Denso's Revenue by Customer, FY2010-FY2014

Denso's Customer Structure, FY2013-2014
Kefico's Main Customers
Kefico's Revenue, 2012-2013
Faurecia's Number of Employees (by Business), 2011-2013
Faurecia's Number of Employees (by Region), 2011-2013
Faurecia's Development Plan in China
Faurecia's Production Base in China
Faurecia's Future Five-year Plan in China
Revenue Structure of TENNECO by Business, 2013
Major Brands and Products of TENNECO's Clean Air Business Unit
Production Bases of TENNECO Worldwide
Production Bases of TENNECO in China
Exhaust System Production Bases of J. Eberspaecher Worldwide
Gasoline-fueled Vehicle Exhaust Catalytic Converter of
World's Output of Passenger Cars, YoY Growth and % in Automobile Output,
2007-2018E
Top 20 Countries (based on 2012-year rankings) by Cars Output, 2007-2014
Global Gasoline Exhaust System Accessible Market Size, 2009-2014
China's Automobile Output and Sales Volume (by Passenger Vehicle and Commercial
Vehicle), 2009-2017E
China's Passenger Vehicle Output, YoY Growth, 2005-2017E
Market Share of Various Models by Sales Volume in China's Passenger Vehicle
Market, 2008-2014
China's Top10 Manufacturers by Passenger Vehicle Sales Volume, 2008-2014
China's Bus Output (by Model), 2009-2017E
China's Bus Sales Volume (by Model), 2009-2017E
China's Top10 Manufacturers Based on Bus Output and Sales Volume (by Model),
2012-2013
China's Top10 Manufacturers Based on Bus Output and Sales Volume (by Model),
2014
China's Truck Output (by Model), 2009-2017E
China's Truck Sales Volume (by Model), 2009-2017E
China's Top10 Manufacturers Based on Truck Output and Sales Volume (by Model),
2012-2013
China's Top10 Manufacturers Based on Truck Output and Sales Volume (by Model),
2014
Key Policies about Environmental Control in China, 2012-2013
China's Annual Average Demand for TWC, 2012-2014
Leading Chinese Manufacturers of Catalytic Converter and the Supported Vehicle

Manufacturers, 2013-2014
Platinum Production of Implants, FY2010-FY2014
Key Financial Data of Sino-Platinum Metals, 2010-2014
Revenue Breakdown of Sino-Platinum Metals by Product, 2010-2014
Revenue Breakdown of Sino-Platinum Metals by Region, 2010-2014
Major Subsidiaries of Sino-Platinum Metals, 2014
Cataler's Development History
Cataler's Major Clients
Mobile Catalyst Revenue of BASF, 2007-2013
Umicore's Revenue and EBIT Margin, 2005-2013
Umicore's Revenue Breakdown by Segment, 2010-2013
Umicore's Catalyst Revenue and EBITDA, 2008-2013
Corning's Revenue and Gross Margin, 2006-2014
Corning's Revenue Breakdown by Segment, 2011-2014
Corning's Revenue and Net Income from Environmental Technologies, 2005-2013
Ibiden's Financial Indicators, FY2010-FY2014
Bosch's Financial Indicators, 2009-2014
Delphi's Revenue (by Region), 2010-2013
Delphi's Revenue (by Division), 2010-2013
Delphi's Gross Margin (by Division), 2010-2013
Revenue Breakdown of Denso by Division, FY2011-FY2015Q1
Faurecia's Revenue and YoY Growth, 2009-2014
Faurecia's Net Income and YoY Growth, 2011-2013
Faurecia's Net Profit Margin, 2011-2013
Faurecia's Revenue Structure (by Business), 2011-2014
Faurecia's Revenue Structure (by Region), 2011-2013
Faurecia's Revenue Structure (by Client), 2011-2013
Faurecia's Investment (by Business), 2011-2013
Faurecia's Investment (by Region), 2011-2013
R&D Costs and % of Total Revenue of Faurecia, 2009-2013
Faurecia's Sales in China, YoY growth, % of Total sales, 2009-2013
Major Supporting Models
Major Financial Data of TENNECO, 2008-2013
Revenue Contribution (%) of TENNECO's Major Clients, 2011-2013
TENNECO's Major Supporting Models, 2014
Financial Data of J. Eberspaecher, 2012-2013
Revenue of J. Eberspaecher by Segment, 2011-2013
Revenue of J. Eberspaecher by Region, 2011-2013
Major Supporting Models of J. Eberspaecher, 2014

R & D Costs of J. Eberspaecher, 2011-2013

Revenue, Net Income and Gross Margin of Weifu High-tech, 2014

Revenue Breakdown of WeiFu High-tech by Region, 2009-2013

Revenue Breakdown of WeiFu High-tech by Business, 2009-2013

Exhaust Gas After-treatment System Related Companies and Products of WeiFu High-tech

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