

Global and China Automotive Air Conditioner Industry Report, 2009-2010

<https://marketpublishers.com/r/GC163D0590AEN.html>

Date: July 2010

Pages: 131

Price: US\$ 2,300.00 (Single User License)

ID: GC163D0590AEN

Abstracts

Japan is an overlord in household air-conditioner field worldwide thanks to its most advanced technology in the core upstream component--compressor. Many Japanese enterprises, including Daikin, Hitachi, Panasonic, Toshiba, Mitsubishi Heavy Industries and Mitsubishi Electric, are the key players in compressor industry. As such, American enterprises still have competitive strength in high-power air-conditioning compressor industry, represented by Carrier, Trane, Copeland and York. Accordingly, the automotive air-conditioner field is dominated by Japanese enterprises and American counterparts.

Denso continues its leading role in the sector. Together with Toyota Industries, which is the largest manufacturer of automotive air-conditioning compressor in the world, the collective market share of the two surpasses one third of the total. Automotive air-conditioner or compressor products of Denso have been used by the world's well-known automakers. At the early stage, Denso built massive business in compressor sector. After 2000, Denso began to transfer compressor business to Toyota Industries and focus on the design and sales of the whole system of air-conditioners. Besides, Denso cooperated with Toyota Industries to establish compressor base in overseas country. And Toyota Industries holds always as high as 65% shares of the project. Toyota Industries only produces compressor.

The auto air-conditioner technology of Valeo stems from ZEXEL which originated from DKK. As the biggest producer of diesel fuel injection in Asia, DKK was founded in 1939 with its technology from Bosch. In 2000, ZEXEL was purchased by Bosch, and Bosch only retained diesel injection business and it sold in 2005 its compressor business to Valeo with €100 million. Since then, the joint venture had become the wholly-owned subsidiary of Valeo. Although the compressor business is not its core operation, ZEXEL

still boasts the exceedingly excellent compressor technology.

About 70% revenue of Calsonic Kansei, a membership of Nissan Group, comes from Nissan which holds 32% shares of the company. Calsonic Kansei originally cooperated with Harrison (affiliated to Delphi Corporation) to produce auto air-conditioning compressor, and later acquired compressor business of NSK, which has gained favor from BMW due to its state-of-the-art technology. In particular, BMW contributes more than 70% to revenue of NSK from compressor business. Yet, NSK rests its core business with timing equipments. It is beyond doubt that Calsonic Kansei becomes the supplier of BMW after the acquisition.

Keihin, a carburetor giant, has also made remarkable achievements in compressor sector. In spite of not being compared with the three leading manufacturers aforementioned, Keihin has developed exceedingly loyal clients after years' cooperation with Toyota. Additionally, there has JCS, an up-rising star co-funded by Mazda, Visteon and Panasonic. JCS is expected to witness a bright prospect since it has reliable customers like Mazda and Ford.

Although it is in hardship, Delphi Corp. never tends to quit its core business – automotive thermal system. As the former world's largest manufacturer of auto air-conditioning compressor, Delphi Corp. has long teamed up with Harrison to produce compressors. As an enterprise with 100-year history, Harrison has won a host of faithful customers including Fiat, PSA and Renault apart from its VIP client--GM.

Visteon shares a slice of pie in auto air conditioner field by its role as a share holder of Halla Climate Control Corp. Similar to Delphi Corp, Visteon also concentrates on its automotive thermal system business and has no intention to quit auto air conditioner business. Moreover, Visteon has obtained over 60% auto air conditioner business from Hyundai by relying on Halla Group.

Being short of technology support, Behr, a German enterprise, joins hands with the second largest air-conditioning compressor manufacturer in Japan - Sanden to offset its demerit. In general, the air-conditioner system of Behr employs the compressor produced by Sanden. In recent two years, Behr has been to the bad ceaselessly while the profit of Sanden dropped not so much.

Chinese manufacturers are professional in after-sale maintenance market, which makes China be the largest maintenance base of automotive air-conditioning compressors around the globe. Chinese manufacturers feature high output, low unit price and slim

profit; while the German enterprises are powerful in coach air-conditioner compressor, represented by BITZER which almost monopolizes the market.

HEV (Hybrid Electrical Vehicle) air conditioner is likely to be the development tendency of automotive air-conditioner business. The main difference between HEV and traditional automobile lies in driving energy, which requires the driving mode of air-conditioning compressors to be modified. Currently, the leading enterprises in HEV air-conditioner compressors are Sanden and Toyota Industries.

Contents

1. OVERVIEW OF AUTOMOTIVE AIR CONDITIONER

- 1.1 Profile of Auto Air Conditioner
- 1.2 Profile of Auto Air Conditioner Compressor
- 1.3 HEV Air-Conditioner Compressor
- 1.4 History of Air Conditioner
- 1.5 History of Air Conditioner in China

2. AUTO AIR CONDITIONER MARKET

- 2.1 Auto Air Conditioner Market Worldwide
- 2.2 Auto Air Conditioner Market in China
- 2.3 Supporting Relations between Auto Air Conditioner Manufacturers and Whole Vehicle Manufacturers

3. AUTO AIR CONDITIONER INDUSTRY

- 3.1 Auto Air Conditioner Industry Worldwide
- 3.2 Auto Air Conditioner Industry In China
- 3.3 Auto Air-Conditioner Compressor Industry Worldwide
- 3.4 Auto Air-Conditioner Compressor Industry in China

4. MANUFACTURERS OF AUTOMOTIVE AIR-CONDITIONER

- 4.1 Sanden
 - 4.1.1 Shanghai Sanden Behr Automotive Air Conditioning Co., Ltd.
 - 4.1.2 Shanghai Sanden Automotive Air Conditioning Co., Ltd.
 - 4.1.3 Tianjin Sanden Auto Air-Conditioning Co., Ltd
 - 4.1.4 Suzhou Sanden Precision Components
- 4.2 Denso
 - 4.2.1 Yantai Shougang DENSO Co., Ltd
 - 4.2.2 Tianjin FAWER DENSO Air-Conditioner Co., Ltd.
 - 4.2.3 DENSO (Tianjin) Thermal Products Co., Ltd
 - 4.2.4 Guangzhou Denso Co., Ltd
 - 4.2.5 TACK
- 4.3 BEHR
 - 4.3.1 Dongfeng Behr Thermal Systems Co., Ltd

- 4.3.2 Shanghai Behr Thermal Systems Co., Ltd. (SBTS)
- 4.3.3 Behr-Hella Thermocontrol (Shanghai) Co., Ltd.
- 4.4 CALSONIC KANSEI
 - 4.4.1 Calsonic Kansei (Shanghai) Technology Xiangfan
 - 4.4.2 Calsonic Kansei Technology Wuxi
 - 4.4.3 Calsonic Kansei Auto Electronics (Wuxi)
 - 4.4.4 Calsonic Kansei Automotive Technology (Guangzhou)
- 4.5 Songz Automobile Air Conditioning Co.,Ltd
- 4.6 Valeo
 - 4.6.1 Valeo Automotive Air-conditioning (Hubei) Co.Ltd
 - 4.6.2 Valeo Compressor (Changchun) Co., Ltd
 - 4.6.3 Huada (Hunan) Automotive Air-Conditioning Co., Ltd
 - 4.6.4 FAW ZEXEL
- 4.7 Visteon
 - 4.7.1 Visteon Climate Control (Beijing) Co., Ltd
 - 4.7.2 Visteon (Nanchang) Auto Air-Conditioning
- 4.8 Halla Climate Control Corp.
 - 4.8.1 Halla (Dalian) Air-Conditioning
- 4.9 Delphi Corp.
 - 4.9.1 Shanghai Delphi Automotive Air Conditioning Systems Co. Ltd.
- 4.10 Nanjing Aotecar Refrigerating Co., Ltd
- 4.11 Jiangsu Zhunti Machinery Manufacture Co., Ltd.
- 4.12 Taizhou SaiMa Auto Parts Co., Ltd
- 4.13 Liuzhou Yizhou Automobile Air-Conditioner Co., Ld
- 4.14 Sichuan Tianquan Air Conditioner Co., Ltd
- 4.15 Mudanjiang Foton Automotive Air Conditioner Co., Ltd
- 4.16 KEIHIN
 - 4.16.1 Dong Guan Keihin Engine Management System Co., Ltd
- 4.17 Zhongcheng Air-Conditioning Compressor
- 4.18 Chongqing JianShe Automobile Air Conditioner Co., Ltd
- 4.19 Nanjing Yinmao Compressor Co., Ltd
- 4.20 Mitsubishi Air-Conditioning (Shanghai) Co., Ltd
- 4.21 Toyota Industries
- 4.22 Japan Climate Systems Corporation
- 4.23 Bitzer

5. GLOBAL AUTOMOTIVE MARKET

6. CHINA AUTOMOTIVE MARKET

- 6.1 Automotive Market, 2010H1
- 6.2 Passenger Car Market, 2010
- 6.3 Commercial Car Market, 2010 H1
- 6.4 Import & Export of Vehicles, 2010
- 6.5 Trend of Car Consumption
- 6.6 Recorded Data of Automotive Market, 2005-2010
- 6.7 China Automotive Industry

Selected Charts

SELECTED CHARTS

Global Automotive Air-Conditioner Market Size (by Value), 2008-2013
Global Automotive Air-Conditioner Market Size (by Shipment), 2008-2013
China Automotive Air-Conditioner Market Size (by Value), 2008-2013
China Automotive Air-Conditioner Market Size (by Shipment), 2008-2013
Supporting Relations between Auto Air-Conditioner Manufacturers and Whole Vehicle Manufacturers, 2009
Market Shares of Leading Auto Air-Conditioner Manufacturers by Shipment Worldwide, 2009
Market Shares of Leading Auto Air-Conditioner Manufacturers by Value Worldwide, 2009
Market Shares of Auto Air-Conditioner Manufacturers in China, 2009
Market Shares of Leading Auto Air-Conditioner Compressor Manufacturers by Shipment Worldwide, 2009
Market Shares of Leading Auto Air-Conditioner Compressor Manufacturers by Value Worldwide, 2009
Market Shares of Auto Air-Conditioner Compressor Manufacturers by Value in China, 2009
Market Shares of Auto Air-Conditioner Compressor Manufacturers by Shipment in China, 2009
Revenue and Operating Margin of Sanden, FY2006-FY2011
Revenue and Operating Margin of Sanden, 2008Q2-2010Q1
Revenue of Sanden by Product, 2006-2011
Shipment and Sales of Sanden Auto Air-Conditioner Compressor, 2008-2011
Revenue of Sanden by Region, FY2008-FY2011
Revenue and Operating Margin of Shanghai Sanden Behr Automotive Air Conditioning Co., Ltd, 2004-2009
Revenue and Operating Margin of Shanghai Sanden Automotive Air Conditioning Co., Ltd, 2004-2009
Revenue and Operating Margin of Tianjin Sanden Automotive Air Conditioning Co., Ltd, 2004-2009
Revenue and Operating Margin of Denso, FY2006-FY2010
Client Structure & Proportions of Denso, FY2008-FY2010
Product Structure & Proportions of Denso, FY2008-FY2010
Organization Structure of Yantai Shougang Denso Co., Ltd
Revenue of Shougang Denso, 1997-2007

Distribution of Shougang Denso Plants

Revenue and Operating Margin of Tianjin FAWER DENSO Air-Conditioner, 2006-2009

Revenue and Operating Margin of Guangzhou Denso, 2004-2009

Revenue and EBT Margin of BEHR, 2005-2010

Number of Employees, Proportion of R&D Expenditure in Revenue of BEHR, 2005-2009

Revenue of BEHR by Region, 2005-2009

Sales of BEHR in Developing Countries, 2005-2009

Revenue of BEHR by Product, 2005-2009

Employees Distribution of BEHR by Region, 2005-2009

Sales Volume of Air Conditioners of BEHR, 2008 vs. 2009

Sales Volume of Engine Cooling Systems of BEHR, 2008 vs. 2009

BEHR Presence in Asia

Customer Distribution of Shanghai Behr Thermal Systems

Revenue and Operating Margin of Calsonic Kansei, FY2004-FY2011

Revenue of Calsonic Kansei by Region, FY2009-FY2011

Operating Margin of Calsonic Kansei by Region, FY2009-FY2010

Equipment Investment and R&D Funds of Calsonic Kansei, 2007-2011

Revenue and Operating Margin of Calsonic Kansei (Shanghai) Technology Xiangfan, 2006-2010

Revenue and Operating Margin of Calsonic Kansei (Wuxi) Technology, 2004-2009

Revenue and Operating Profit Margin of Calsonic Kansei Automotive Technology (Guangzhou), 2005-2009

Revenue and Operating Margin of Songz Automobile Air Conditioning, 2007-2013E

Sales of Valeo, 2008Q1-2010Q1

Gross Margin of Valeo, 2008Q1-2009Q4

Operating Margin of Valeo, 2008Q1-2009Q4

Revenue from OEM Sector of Valeo by Region, 2009

Revenue and Operating Margin of Valeo Automotive Air-conditioning (Hubei), 2004-2009

Revenue and Operating Margin of Huada (Hunan) Automotive Air-Conditioning, 2004-2009

Revenue and Operating Income of FAW ZEXEL

Revenue and Gross Margin of Visteon, 2004-2009

Revenue of Visteon by Country, 2008-2009

Revenue of Visteon by Product, 2007-2009

Revenue and Operating Margin of Visteon Climate Control (Beijing) Co., Ltd

Revenue and Operating Margin of Halla Climate Control Corp., 2006-2009

Revenue and Operating Margin of Halla (Dalian) Air-Conditioning, 2006-2009

Revenue and Gross Margin of Delphi, 2004-2009
Revenue of Delphi by Region, 2005 vs.2009
Number of Employees of Delphi by Region Worldwide, 2009
Revenue of Delphi by Product, 2006-2008
Customer Distribution of Delphi, 2006-2008
Revenue and Operating Margin of Shanghai Delphi Automotive Air Conditioning Systems, 2004-2009
Revenue and Operating Margin of Nanjing Aotecar Refrigerating, 2004-2010
Revenue and Operating Margin of Jiangsu Zhunti Machinery Manufacture, 2004-2009
Revenue and Operating Margin of Mudanjiang Foton Automotive Air Conditioner, 2004-2011
Revenue and Operating Margin of KEIHIN, 2005-2011
Revenue and Operating Margin of KEIHIN, FY2005-FY2011
Revenue of Keihin by Region, FY2005-FY2011
Revenue of Keihin by Product, FY2005-FY2008
Customer Distribution of Chongqing JianShe Automobile Air Conditioner
Revenue and Operating Margin of Chongqing JianShe Automobile Air Conditioner, 2004-2009
Revenue and Sales Volume of Chongqing JianShe Automobile Air Conditioner, 2004-2009
Revenue and Operating Income of Toyota Industries, FY2005-FY2011
Revenue of Toyota Industries by Product, 2008-2011
Revenue from Compressor Business of Toyota Industries, FY2008-FY2011
Sales Volume of Compressors of Toyota Industries, FY2005-FY2011
Monthly Sales of China Automotive Industry, 2006-2010
Yearly Sales of China Automotive Industry, 2003-2010
Year-on-Year Sales of China Automotive Industry by Month, Jan.2008-May2010
Monthly Sales of Chinese Passenger Car Sub-Sectors, Jan.2005-May2010
Monthly Sales of Chinese MPV Sub-Sectors, Jan.2005-May2010
Monthly Sales of Chinese SUV Sub-Sectors, Jan.2005-May2010
Sales and Growth Rates of Top 10 Automakers (by Sale), Jan.-May, 2010
Sales and Growth Rates of Top 10 Passenger Car Manufacturers (by Sale), Jan.-May, 2010
Sales and Growth Rates of Top 10 Commercial Car Manufacturers (by Sale), Jan-May, 2010

Ranking by Revenue of 26 Auto Air Conditioner Manufacturers in China, 2009
Revenue and Shipment of 11 Auto Air-Conditioner Compressor Manufacturers in China, 2009

Revenue, Profit, Export Value (Auto Air-Conditioner), and Employees of Denso in China, 2008

Revenue, Profit, Export Value, Employees of Calsonic Kansei (China), 2008

Air-Conditioner Sales Volume of Songz Automobile Air Conditioning

Capacity and Output of Songz Automobile Air Conditioning, 2007-2009

Sales Volume and Sales Value of Songz Automobile Air Conditioning, 2007-2009

Average Price of Air Conditioners of Songz Automobile Air Conditioning, 2007-2009

Cost Structure of Songz Automobile Air Conditioning, 2007-2009

5 Leading Suppliers of Songz Automobile Air Conditioning, 2009

Revenue of Delphi by Region, 2006-2008

Monthly Revenue & Profit Growth of Major Automakers, Mar.2009-Mar.2010

I would like to order

Product name: Global and China Automotive Air Conditioner Industry Report, 2009-2010

Product link: <https://marketpublishers.com/r/GC163D0590AEN.html>

Price: US\$ 2,300.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/GC163D0590AEN.html>