

Global and China Automotive Aluminum Wheel Industry Report, 2011-2012

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Abstracts

Global and China Automotive Aluminum Wheel Industry Report, 2011-2012 covers the followings:

Global and Chinese Automotive Market

Global and Chinese Aluminum Wheel Industry

Research on 31 Major Aluminum Wheel Manufacturers Worldwide

Research on 5 Major Steel Aluminum Wheel Manufacturers in China

In China, aluminum wheel manufacturers can be divided into two categories, aftermarket-oriented, mainly referring to small- and medium-sized producers, and OEM market-oriented, chiefly large-sized ones. Aftermarket consists of domestic and foreign types, there are numerous small-sized manufacturers targeting the former, about 80-100, each with annual output of less than 10,000 units; while manufacturers aimed at foreign aftermarket are mainly concentrated in Zhejiang, Guangdong and Jiangsu, numbering up to 3,000, including 700-900 active ones.

2011 is a year of harvest for Chinese aluminum wheel manufacturers, whose main export destinations were United States, Russia, Germany and the UAE, of which, the U.S. market occupied around half of total shares. The U.S. automobile industry saw strong recovery, particularly pickup, light truck and heavy truck, which required large-diameter wheel hubs with unit price 2-3 times higher than that of passenger cars. In 2011, the wheel export of China reached US\$4.382 billion, breaking through US\$4

billion for the first time, of which, aluminum wheels climbed 24.8% to US\$3.886 billion, and steel wheels US\$696 million with a 40% rise, both setting new records.

The soaring oil price drives recovery of economic situations in Russia and the Middle East, as well as boosts aluminum wheel aftermarket, especially Russia, the main export destination of small- and medium-sized aluminum wheel firms in Zhejiang province, China. Despite Chinese automotive market was sluggish in 2011, the luxury car market boomed and witnessed the substantially increased export of aluminum wheels to Germany. Although EU charged anti-dumping duties on aluminum wheel made in China, Chinese companies were still competitive. CITIC Dicastal, mainly dealing with exports to Germany, realized export value of US\$417 million in 2011, a rise of 20.9% from US\$345 million in 2010.

Relying on port advantages, Lianyungang has been centered around a batch of aluminum wheel enterprises, led by Alink Wheel (LYG), which supplies Hyundai Motor's base in Yancheng city, and launches vigorous export to the U.S.; in 2011, it became China's second largest aluminum wheel hub manufacturer with revenue growth of 76%. Binzhou Movever Dicastal Hub Co., Ltd., principally aiming at German aftermarket, also witnessed a significant rise in performance, up as high as 173%.

The robust export market fuels Chinese manufacturers to carry capacity expansion successively, and a great number of aluminum wheel projects are being prepared to be constructed. Larger expansions refer to Shanghai Mingqi Aluminum Industry's 10 million units/a Project in Yizheng, Jiangsu, Jinfei Machinery's 5.4 million units/a Project in Inner Mongolia, Beijing East Asia Aluminum Industry's 10 million units/a Project in Hohhot, Inner Mongolia, the 2 million units/a Project in Yihuang, Jiangxi, and the 5 million units/a Project in Yuncheng, Shanxi.

According to incomplete statistics, there are approximately 50 aluminum wheel projects under construction, and the new annual capacity by end-2013 will approach 100 million units. Presently, the total size of global market currently is less than 300 million units, which is out of question severe overcapacity.

China's huge exports also aroused strong discontent from U.S. companies. The latter has initiated anti-dumping on Chinese steel wheel hubs, and on aluminum wheels, just a matter of time; so has India. For Chinese enterprises, export market is still the best choice, for the impossibility to enter the OEM market, plus the extremely high cost of domestic aftermarket.

Big events in the automotive wheel industry in 2011 included Brazil-based lochpe-Maxion's acquisition of Hayes Lemmerz, the world's largest wheel company, with US\$725 million in cash. lochpe-Maxion itself boasts annual capacity of 26 million units of wheels, combined with Hayes Lemmerz's, totaling up to 90 million units, containing 75 million steel wheels and 15 million aluminum wheels. At the end of 2011, Unison Capital, a Japanese private equity firm, projected JPY23.9 billion (about US\$310 million) to purchase Asahi Tec.

Contents

1 GLOBAL AUTOMOTIVE MARKET

- 1.1 Market
- 1.2 Automakers and Sales Volume

2 CHINA AUTOMOTIVE MARKET

- 2.1 Market Review
- 2.2 Market in 2012
- 2.3 Competition of Automakers
- 2.4 China Automotive Industry
 - 2.4.1 Automobile
 - 2.4.2 Auto Parts

3 GLOBAL & CHINA ALUMINUM WHEEL MARKET

- 3.1 Global Market
- 3.2 Production by Region
 - 3.2.1 EU Wheel Industry
- 3.3 Supply between Wheel Suppliers and Automakers
- 3.4 Wheel Export of China
- 3.5 China Aluminum Wheel Market
- 3.6 China Steel Wheel Market
- 3.7 Ranking of Global Aluminum Wheel Manufacturers

4 ALUMINUM WHEEL MANUFACTURERS

- 4.1 Citic Dicastal Wheel Manufacturing
 - 4.1.1 Dicastal-Xinglong Wheel Manufacturing
 - 4.1.2 Binzhou Movever Dicastal Hub
 - 4.1.3 Chongqing Dicastal Jieli Wheel
- 4.2 Lizhong Wheel
- 4.3 Jinfei Machinery Group
- 4.4 Sanmenxia Dicastal Wheel Manufacturing
- 4.5 Lioho Machinery
 - 4.5.1 Kunshan Liufeng Machinery
 - 4.5.2 Lioho Light Metal (Kunshan)

- 4.5.3 Hunan LIOHO Changfeng Light Metals
- 4.6 Sheng Wang Auto Parts
- 4.7 Zhejiang Wanfeng Auto Wheel
- 4.8 Dare Wheel Manufacturing
- 4.9 P&W Group
- 4.10 Shanghai Jinheli Aluminum Wheel Hub Manufacture
- 4.11 Dongling Group
- 4.12 ALCOA
- 4.13 Hayes Lemmerz
- 4.14 ENKEI
- 4.15 Central Motor Wheel
- 4.16 ASAHI TEC
- 4.17 Accuride
- 4.18 Surperior Industries International
- 4.19 Borbet
- 4.20 UNIWHEEL
- 4.21 RONAL
- 4.22 YHI
- 4.23 TOPY
- 4.24 KWC
- 4.25 Donghwa Casting
- 4.26 Stonewell International
- 4.27 Shanghai Mingqi Aluminum Industry
- 4.28 Alink Wheel Lianyungang
- 4.29 Yueling
- 4.30 Kosei Aluminum
- 4.31 Super Alloy Industrial

5 AUTOMOTIVE STEEL WHEEL MANUFACTURERS

- 5.1 DongFeng Automotive Wheel
- 5.2 China Zenix Auto International
- 5.3 FAWAY AUTOMOBILE COMPONENTS
- 5.4 Shandong Xingmin Wheel
- 5.5 Zhejiang Jingu

Selected Charts

SELECTED CHARTS

Global Light-duty Vehicle Output and Popularity of Aluminum Wheel, 2006-2012
Global Aluminum Wheel Market Size (Output), 2006-2012
Global Aluminum Wheel Market Size (Output Value), 2006-2012
Output Value of Global Aluminum Wheel Industry by Region, 2008-2011
Global Aluminum Wheel Output by Region, 2008-2011
Popularity of Aluminum Wheel in EU, 2010-2015
Market Shares of EU's Aluminum Wheel Manufacturers, 2010
Germany's Import Volume and Value of Aluminum Wheel, 2005-2010
Suppliers of Aluminum Wheel for Toyota, 2008-2011
Suppliers of Aluminum Wheel for Honda, 2008-2011
Suppliers of Aluminum Wheel for Nissan, 2008-2010
Suppliers of Aluminum Wheel for GM, 2008-2011
Suppliers of Aluminum Wheel for Ford, 2008-2011
Suppliers of Aluminum Wheel for VW, 2008-2011
Suppliers of Aluminum Wheel for Hyundai, 2011
Export Value of Chinese Automotive Wheels, 2004-2011
Export Value of Chinese Automotive Wheels and Components by Province, 2010
Geographical Distribution of Chinese Automotive Wheel and Components Export Value, 2010
Market Shares of Major Manufacturers in Chinese Steel Wheel Market, 2010 (by Value)
Market Shares of Major Manufacturers in Chinese Steel Wheel Market, 2010 (by Shipment)
Revenue and Net Profit Margin of Citic Dicastal Wheel Hub Manufacturing, 2004-2011
Revenue and Operating Margin of Lizhong Wheel, 2003-2011
Revenue of Lizhong Wheel by Region, 2006-2011
Capacity Utilization of Lizhong Wheel, 2004-2011
Geographical Distribution of Lizhong Wheel
Revenue and Operating Margin of Sanmenxia Dicastal Wheel Manufacturing, 2004-2011
Shipment and Average Price of 2Sanmenxia Dicastal Wheel Manufacturing, 2006-2010
Revenue and Operating Margin of Zhejiang Wanfeng Auto Wheel, 2006-2011
Overseas Revenue Percentage of Zhejiang Wanfeng Auto Wheel, 2006-2010
AM and OEM Percentages of Zhejiang Wanfeng Auto Wheel, 2005-2010
Revenue of Zhejiang Wanfeng Auto Wheel by Product, 2007-2010
Operating Margin of Zhejiang Wanfeng Auto Wheel by Product, 2007-2010

Cost Structure of Zhejiang Wanfeng Auto Wheel, 2007-2010
Revenue and Net Profit Margin of Hayes Lemmerz, FY2005-FY2012
Revenue of Hayes Lemmerz by Country
Output of ENKEI by Region, 2010
Revenue and Operating Income of ASAHI TEC, FY2004-FY2011
Revenue of ASAHI TEC by Region, FY2008 vs. FY2009
Revenue and Operating Margin of Accuride, 2006-2011
Revenue of Accuride by Product, 2007-2011
Gross Profit of Accuride by Product, 2007-2010
Revenue and Operating Margin of SII, 2004-2011
Shipment and Average Price of SII, 2007-2011
Quarterly Shipment of SII, Q1 2006-Q4 2010
Major Customers and Their Proportions of SII, 2010
Proportion of Top Three Customers of SII, 2006-2011
Global Presence of Borbet
Operating Revenue of Borbet, 2001-2011
Revenue and EBITDA of UNIWHEEL, 2008-2013
Shipment of UNIWHEEL, 2008-2013
Organization of UNIWHEEL
Organization of YHI
Revenue and Operating Margin of YHI, 2004-2011
Revenue of YHI by Business, 2004-2010
Revenue of YHI by Region, 2009-2011
Revenue and Operating Income of TOPY, FY2004-FY2011
Revenue and Operating Income of TOPY from Automobile and Construction Machinery Field, FY2004-FY2010
Revenue and Operating Margin of China Zenix Auto International, 2004-2011
Revenue and Gross Margin of China Zenix Auto International, Q1 2009-Q4 2010
Organization of China Zenix Auto International
Revenue of China Zenix Auto International by Business, 2008-2011
Gross Margin of China Zenix Auto International by Business, 2008-2009
Revenue of China Zenix Auto International by Product, 2008-2011
Gross Margin of China Zenix Auto International by Product, 2008-2010
Cost Structure of China Zenix Auto International, 2008-2010
Geographical Distribution of China Zenix Auto International
Capacities and Capacity Utilization of Major Production Bases of China Zenix Auto International, 2008-2010
HR Distribution of China Zenix Auto International
Revenue and Operating Margin of FAWAY Automobile Components, 2005-2011

Revenue and Operating Margin of Shandong Xingmin Wheel, 2006-2011
Shipment of Shandong Xingmin Wheel by Product, 2006-2010
Revenue of Shandong Xingmin Wheel by Product, 2006-2011
Revenue of Shandong Xingmin Wheel from AM/OEM, 2006-2009
Gross Profit of Shandong Xingmin Wheel by Product, 2006-2009
Selling Prices of Products of Shandong Xingmin Wheel, 2006-2009
Cost Structure of Shandong Xingmin Wheel, 2009
Revenue and Operating Income of Zhejiang Jingu, 2007-2011
Revenue of Zhejiang Jingu by Business, 2007-H1 2010
Top 5 Customers of Zhejiang Jingu (Export), H1 2010
Top 5 Customers of Zhejiang Jingu (Domestic Sales), H1 2010
Global Output of Light-duty Vehicle, 2007-2013
Light-duty Vehicle Output by Region, Worldwide, 2010-2012
Sales Volume of Global Key Car Brands, 2010-2011
Market Shares of Brands (by Country) in Chinese Automobile Market, Jan.-Feb., 2012
Market Shares of Brands (by Country) in Chinese Automobile Market, 2009-Feb.2012
Market Shares of Car Models in Chinese Automobile Market, 2009-Feb.2012
Market Shares of Levels of Chinese Automobile Market, 2009-Feb.2012
Sales Volume Growth Rates of Key Domestic Automobile Groups in China, Jan.-Feb., 2012
Market Shares of Domestic Automobile Groups in China, 2009-Feb.2012
Sales Volume Growth Rates of Key Overseas Automobile Groups in China, Jan.-Feb.2012
Market Shares of Overseas Automobile Groups in China, 2009-Feb.2012
Gross Margin, Pre-tax Profit Margin and SG&A Rate of Chinese Complete Vehicle Industry, 2002-2011
Monthly Investment and Growth Rate of Chinese Complete Vehicle Industry, Jan.2008-Dec.2011
Gross Margin, Pre-tax Profit Margin and SG&A Rate of Chinese Auto Parts Industry, 2002-2011
Monthly Investment and Growth Rate of Chinese Auto Parts Industry, Jan.2008-Dec.2011
Export Value of Chinese Aluminum Wheels and Steel Wheels, 2007-2011
Export Value of Top 12 Manufacturers in Chinese Automotive Wheel Industry, 2010-2011
Ranking of Top 20 Aluminum Wheel Manufacturers in China (by Revenue), 2010-2011
Aluminum Wheel Hub Projects under Construction in China
Ranking of World's Top 25 Aluminum Alloy Wheel Manufacturers by Revenue, 2010-2011

Revenue and Gross Margin of Lizhong Wheel, Q1 2010-Q4 2011
Revenue of Lizhong Wheel by Business, Q1 2010-Q4 2011
Selected Financial Data of Kunshan Liufeng Machinery, 2004-2010
Selected Financial Data of LIOHO Light Metal (Kuanshan), 2004-2010
Selected Financial Data of Hunan LIOHO Changfeng Light Metals, 2006-2010
Selected Financial Data of Guangzhou Dicastal-ASAHITEC Aluminum Casting Co., Ltd., 2005-2009
Revenue and Gross Margin of lochpe-Maxion, 2006-2011
Revenue and Net Profit Margin of lochpe-Maxion, 2006-2011
Revenue of lochpe-Maxion by Business, 2006-2011
Automotive Wheel Revenue of lochpe-Maxion, 2006-2011
Customer Structure of lochpe-Maxion, 2010-2011
lochpe-Maxion Region in Value – 2011
Organization of Hayes Lemmerz
Revenue of Hayes Lemmerz by Customer, 2010
Shipment of Hayes Lemmerz by Product, 2007-2011
Aluminum Wheel Hub Production Bases of Hayes Lemmerz by Region
Selected Financial Data of ENKEI, 2004-2010
Non-consolidated Revenue of Central Motor Wheel, FY2003-FY2012
Revenue of Central Motor Wheel by Product, FY2011
Selected Financial Data of Central Motor Wheel Guangzhou Co., Ltd, 2006-2011
Revenue and Operating Income of ASAHI TEC, FY2008 vs. FY2009
Car Models Supported with Products of Surperior Industries International
Wheel Manufacturing Bases of TOPY Worldwide
Revenue and Export Value of Zhejiang Yueling, 2005-2011
Monthly Revenue and Growth Rate of Super Alloy Industrial, Feb.2010-Feb.2012

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