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Global and China Automotive Exhaust System Industry Report, 2014-2015

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Abstracts

Global and China Automotive Exhaust System Industry Report, 2014-2015 covers the following:

1. Overview of Global Automotive Market and Industry;
2. Analysis on China's Automotive Market and Industry;
3. Analysis on Global Automotive Exhaust System Market and Industry;
4. Analysis on China's Automotive Exhaust System Market and Industry;
5. Analysis on China's Automotive Emission Regulations;
6. Research on 13 automotive exhaust system manufacturers, 3 substrate manufacturers and 7 catalyst manufacturers.

In 2009, the average price for the exhaust system of each gasoline engine-powered vehicle reached approximately USD250. However, as the environmental protection policies became increasingly strict, this figure climbed to USD280 in 2014. Comparatively, the exhaust system of diesel engine-powered vehicles was much more expensive, with the price for each unit totaling USD350 in 2009 and USD530 in 2014.

In September 2014, the Euro 6B standard for light-duty vehicles officially came into force, which, combined with a sharp rise in vehicle sales volume in the United States and China, helped prompt the global auto exhaust system market to increase by 3.2% to USD33.1 billion, which was a little faster than 2.3% in 2013.

In 2017, Europe will begin to put Euro 6C standard into effect while China may implement Euro 6A standard for gasoline vehicles. It is expected, therefore, that by 2016 the automotive exhaust system market will expand significantly by 7%. However, it is very likely that only a small number of new standards would go into effect in 2015,

and China's high-speed growth will become a past. Thus, we project that the market size of global automotive exhaust system will rise 2.1%.

China's diesel engine-driven vehicle exhaust system market may continue to be disappointing. As early as May 2005, the Chinese government announced the national IV standard would come into effect on January 1, 2011, which was delayed for 5 times. It was on January 1, 2015 that the standard was put into effect. But in 2015, with China's economic downturn and declined commercial vehicle sales volume, the competition from commercial vehicles boils down to price competition. The national IV standard will be not implemented at all and therefore most vehicles will still take national III standard.

In 2014, the sales volume of trucks in China totaled 3.18 million units in 2014, down 8.9% year on year. Among them, affected by the factors including the increased costs caused by the national IV standard and the automakers' inadequate production, only 1.66 million light-duty trucks were sold, decreasing by 240,000 units from 1.9 million units in 2013, a full-year 12.9% drop. We predict that this rate will rise in 2015.

In China, more than 4-ton vehicles use high pressure common rail + SCR while less than 4-ton models take high pressure common rail + EGR. However, China now lacks special gas stations that can fill urea and will not have. The operating costs of trucks are extremely high and truck owners can only get low profits, thus forcing them into bringing down costs. Hence, they are reluctant to fill urea. Meanwhile, out of a motive of environmental protection, very few trucker owners choose to buy the national IV standard vehicles.

The upstream sectors of automotive exhaust system, substrate and catalyst in particular, are the most profitable. In terms of substrate, the combined market share of the top 3 global enterprises—NGK, Corning, and Ibiden exceeded 96%. NGK and Corning viewed China as the most important market, especially Corning, which achieved a nearly 20% growth in 2014. Ibiden thoroughly focused on the European and American markets and scored poor performance in China, thereby leading its revenue to continuously decline.

With regard to catalyst, the market size of automotive catalyst reached as much as USD11.7 billion in 2014, up 8.0% from 2013. The total market share of the top three manufacturers exceeded 80%, with the competition mainly concentrated in China. The top three players—BASF, Johnson Matthey, and Umicore successively extended their presence into mainland China. Umicore, once lagged behind, doubled its capacity in

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2014 and will very likely achieve good performance in 2015.

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