

Research Report on Automobile Air-Conditioner Industry in China, 2018-2022

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Abstracts

Description

An automobile air-conditioner system is a device for refrigerating, heating, ventilation and air purification. It can provide comfortable environment for occupants, reduce fatigue strength of drivers and enhance driving safety. An air-conditioner device has been perceived as one of the standards to measure automobile performances.

The automobile air-conditioner industry develops rapidly along with the automobile industry in China. China has been the world's largest producer and distributor of automobiles for 9 years from 2009 to 2017. Its production volume of automobile air-conditioners exceeded 40 million units in 2017, among which more than 20 million was assembled in automobiles that were produced in China. In addition, a large number of air-conditioners were exported to international markets.

According to CRI, foreign-invested enterprises have a prominent advantage in China's automobile air-conditioner market. Especially in the whole-vehicle OEM market, foreign-invested enterprises take up a majority of market shares. Chinese domestic air-conditioner manufacturers tend to cluster in Zhejiang province and Guangdong province. However, less advanced technologies of these domestic manufacturers force them to mainly serve the automobile aftermarket and domestic automobile brands. Leading enterprises in China's automobile air-conditioner market include Denso, Valeo, Delphi, Visteon and MAHLE. In terms of the passenger vehicle market, leading enterprises include Denso, Valeo, Visteon, Macs and Delphi and those in the commercial vehicle market include Nanjing Xiezhong, Hubei Meibiao, Dongfeng MAHLE and Valeo.

CRI analyzes that China's automobile air-conditioner market consists of the whole-vehicle OEM market and the aftermarket, among which the whole-vehicle OEM market represents a larger share. The market size of automobile air-conditioners in terms of value exceeded CNY 30 billion in China in 2017. The annual growth rate is expected to maintain over 10% from 2018 to 2022.

CRI forecasts that increasing production volume of automobiles, rising export volumes of automobile air-conditioners and components as well as development of new-energy automobile will act as major growth momentums in China's automobile air-conditioner industry between 2018 and 2022, contributing to an increase in the unit cost of HVAC (heating, ventilation and air conditioning). Considering that the automobile and component manufacturing industry is one of pillar industries of Chinese economy, it is estimated that in the next few years, the Chinese government and local governments will publish a series of policies in favor of development of the automobile air-conditioner industry.

Readers can obtain the following information or more through this report:

Economic and Policy Environment Faced by Automobile Air-Conditioner Industry

Development Status of Global and Chinese Automobile Industry

Analysis on Automobile Air-Conditioner Industry Chain

Analysis on Supply and Demand of Automobile Air-Conditioners

Price Trend of Raw Materials of Automobile Air-Conditioners

Analysis on Competition in Automobile Air-Conditioner Market

Major Automobile Air-Conditioner Manufacturers in China

Analysis on Export of Automobile Air-Conditioners in China

Driving Forces and Market Opportunities of Automobile Air-Conditioner Industry in China, 2018-2022

Risks and Challenges Faced by Automobile Air-Conditioner Industry in China, 2018-2022

Forecast on Supply and Demand of Automobile Air-Conditioners in China,
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