

# Research Report on China Auto Parts Industry, 2010-2019

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## Abstracts

### Description

As the basis of auto industry, auto parts are necessary for its sustained healthy development. In recent years, Chinese auto industry has raised its international status and consolidated its status as the pillar of national economy. The comprehensive competitiveness of auto parts industry has increased with industrial cluster taking shape and export level going up.

With the rapid rise of such manufacturing bases as Changchun, Shiyuan, Wuhu, Huadu, Bohai Rim especially Beijing-Tianjin-Hebei, auto parts industry have formed six industrial clusters, namely, Bohai Rim, Beijing-Tianjin-Hebei, Central China, Southwest China, Yangtze River Delta and South China.

In recent years, auto industry has undergone rapid development in China, auto sales and output reporting over 23 million in 2014 and ranking first in the world for six successive years. Meanwhile, auto parts industry has been developing fast too. By the end of 2014, there were about 200,000 auto parts manufacturers in China, among which 16,000 were major ones, over 10,000 reported an annual sales value of CNY 20 million (about USD 3.22 million) and over 1,200 were foreign companies. In 2014, the total output of auto parts industry surpassed CNY 300 billion which accounted for 50% of that of auto industry.

Auto parts in China mainly serve vehicle assembly market and after-sale service market whose demands respectively take up 80% and 20% of the total demand.

Auto parts industry occupies a strategic position in national economy with large

amounts of upstream and downstream industries. Steel, non-ferrous metal, equipment manufacturing industries are the upstream industries while vehicle assembly market and after-sale service market are the downstream ones.

The downstream section of auto parts industry can be classified into two parts: auto market and after-sale service market. In auto market, the downstream industry of auto parts industry is auto industry and their relationship features mutual promotion and dependence. Specifically, the development requirement of auto is the source of the development of auto parts while the synchronous development or even advanced development of auto parts constitutes an important driving force of auto technical advance. Besides, auto parts market is determined by the overall demand of auto market. In after-sale service market, the most direct downstream enterprise is auto parts dealer whose sales network with its coverage and sales ability exerts great influence on auto parts manufacturers. After-sale service market is a retail market where products are sold to customers mainly through professional garage, chain store and retail shop. And it is closely related with the geographical environment and car ownership. The characteristics of after-sale service market determine its regional and hardly concentrated demand for small batches of various products.

The profit of auto parts industry is mainly influenced by the price of upstream raw material and downstream auto. In recent years, the price of steel fluctuates while auto parts manufacturers have to improve product quality and reduce cost due to fierce competition among auto makers, which has squeezed the profit margin of auto parts industry. However, stimulated by the stable growth of auto sales, the profit of auto parts is stable on the whole. As market competition becomes increasingly fierce and auto price drops down, the advantageous enterprises in auto parts industry have to improve their competitiveness and market share by technical upgrading, structural updating and expanded size of production and sales so as to realize a huge gain.

As a cyclical industry, auto parts industry's prosperity is consistent with that of auto industry and closely related with macro-economic situation. As auto industry continues to develop and China gradually becomes the big producer and consumer of vehicles, auto parts industry has entered an industrial period of stable growth. With the rapid development of auto group, the industrial clusters of auto parts industry serving auto makers have developed fast. Currently, six industrial clusters, namely, Northeast China, Bohai Rim, Central China, Southwest China, Yangtze River Delta and Pearl River Delta have gradually taken shape.

As car ownership keeps increasing in China, the market size of auto parts industry will

go up. And the vast market demand for after-sale service leads to large development space for auto parts manufacturers. Besides, government departments have in recent years put forward a new concept of HOPSCA which are being set as a target by more and more cities to develop motor town, auto park and automobile accessories. In the next few years, auto parts industry will continue to develop fast and create more investment opportunities.

Readers can get at least the following information through this report:

- policy and economic environment facing auto parts industry in China

- supply of and demand for auto parts in China

- vehicle manufacturing's demand for auto parts

- car maintenance industry's demand for auto parts

- competition in auto parts market in China

- import and export of auto parts in China

- major auto parts manufacturers in China

- expectation to auto parts industry in China

The author suggests the following groups of people purchase this report:

- auto makers

- auto parts manufacturers

- car maintenance enterprises

- investors/research institutions interested in auto parts industry in China

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## **COMPANIES MENTIONED**

Weichai Power Co., Ltd; China Changan Automobile Group; HUAYU Automotive Systems Co., Ltd; Aeolus Tyre Co., Ltd; Dongfeng Technology; Wanxiang Group; Auto Tyre Manufacturers

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