

Research Report on China's Automobile Spare Parts Industry, 2013-2017

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Abstracts

In China, the automobile spare parts industry refers to the manufacture of motor vehicles and various accessories of their bodies. Automobile spare parts researched in this report mainly include engines, tires, automobile glass, automobile electronics, etc.

With 30 years of development since the reform and opening up, especially the rapid and stable growth of China's automobile market, the overall strength of China's automobile spare parts industry greatly enhances in recent 10 years. Centering on vehicle matching and international market, six major spare parts producing clusters, i.e., Beijing-Tianjin-Hebei, Northeast China, Sichuan-Chongqing, Hunan-Hubei, the Yangtze River Delta and Pearl River Delta as well as 12 state-level automobile spare parts export bases are formed nationwide. In the future, the development of China's automobile spare parts industry is vital to that of China's automobile industry.

As China becomes the world's largest country for the production and sales of automobiles, its automobile spare parts industry also maintains a rapid growth. In 2012, the market size of China's automobile spare parts already exceeds CNY 2 trillion.

The overall engine technologies of China are on the low and medium-end levels globally. Among them, the gasoline engine industry is relatively dispersed. The market is dominated by joint-venture brands, and the self-supply trend of vehicle enterprises is evident; the concentration rate of diesel engines is relatively high. The market is basically occupied by local enterprises, and the share continuously concentrates towards leading enterprises.

The automobile electronics market of China rapidly grows. However, the highly-technological electronic control system field with a relatively large proportion is

dominated by foreign-funded enterprises. Foreign manufacturers almost monopolize fields of core products such as power control, chassis control and high-end airbags; local manufacturers are mainly concentrated in vehicle electronics product fields characterized by relatively low technology thresholds.

The concentration rate of China's automobile tire industry is relatively low, and the market competition is fierce. By virtue of advantages in capital and technologies, foreign-funded enterprises account for over half of the market share. Moreover, the share is up to 80% in the medium and high-end tire fields; local enterprises dominate the low and medium-end markets.

The automobile glass market of China is mainly dominated by Fuyao Glass Industry Group Co., Ltd. and Xinyi Glass Holdings Limited; it is difficult to enter the industry for certain barriers are already formed.

The vehicle matching, after-sales maintenance and export are three main demand sources for China's automobile spare parts market. Compared with automobile manufacturing, China's automobile spare parts market possesses stronger growth trend. Since 2011, the growth rate of China's vehicle production & sales volume slightly declines. However, with the continuous rise in automobile reserve number in China (already exceeding 120 million by the end of 2012) and the production capacity transfer of spare parts internationally, China's automobile spare parts industry will be spurred to continuously develop.

In a fully-mature international automobile market, 50% to 60 % of the profits come from the automobile after-market service field. The scale ratio between vehicles and spare parts in automobile industry is supposed to be above 1:1.5, in line with international standards. According to available data, the total output value of China's automobile spare parts industry always lags behind that of the automobile vehicle manufacturing. In 2011, the scale ratio between them was only 0.41:1. Regarding this, there is still great potential for the development of China's automobile spare parts industry.

More following information can be acquired through this report:

Supply and Demand Status of China's Automobile Spare Parts Industry

Development Status of China's Automobile Engine/Automobile Electronics/Tire/Automobile Glass Industries, etc.

Economic and Industrial Policy Environment Faced by Development of China's Automobile Spare Parts Industry

Competition in China's Automobile Spare Parts Industry

Key Automobile Spare Parts Manufacturers in China's Market and Their Operations

Prediction on Development Trend of China's Automobile Spare Parts Industry

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