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Automotive Aftermarket in China

Industry Study with Forecasts for **2014 & 2019**

Study #2621 | March 2010 | \$5300 | 332 pages

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Growth will be stimulated in part by China's rapidly expanding stock of light vehicles in use, and by rising numbers of older cars, which require more frequent and expensive repairs.

Aftermarket in China to grow 18.3% annually through 2014

The aftermarket for light vehicle components and parts in China is forecast to advance 18.3 percent per annum to ¥164.7 billion in 2014. Growth will be stimulated by the country's rapidly expanding stock of light vehicles in use. Rising numbers of older cars, which require more frequent and expensive repairs, will also contribute to aftermarket sales gains. In addition, value gains will be supported by increasing demand for higher-end aftermarket parts. The greater penetration of nonessential products, such as back-up sensors and GPS, will provide additional impetus for aftermarket sales growth.

Mechanical products to remain largest segment

Mechanical products will remain the largest light vehicle aftermarket segment through 2014, due in large part to the regular replacement requirements of products such as brake parts and filters, and the high cost of items such as engines and associated parts. Demand for electronic products will see the fastest growth, supported by the ongoing rise in the electronic content of the typical light vehicle, as well as increasing consumer demand for nonessential features and entertainment options, which typically have a high electronic content. Replacement rates for exterior and structural parts and for electrical

Automotive Aftermarket in China (71 billion yuan, 2009)



Mechanical
50%

Exterior & Structural
23%

Electrical
17%

Electronic
10%

products will also rise, aided by growth in the number of older cars and the relatively poor road conditions in many areas, which leads to greater wear-and-tear of certain components such as tires.

Small DIY market to outpace pro service providers

Professional service providers will remain dominant throughout the forecast period, an outcome of comparatively low labor costs and, therefore, service fees. The increasing technological complexity of light vehicles in general will continue to support growth in professionally installed aftermarket product demand. However, the small consumer or DIY segment will expand more rapidly as

light vehicle owners become more knowledgeable about vehicle maintenance and repair.

Low-speed vehicles to remain key segment

Although facing fierce competition from light vehicles, low-speed vehicles will remain a major form of transportation equipment in many rural areas in China, benefiting from their low costs and superior performance in terms of carrying passengers and cargo on poor roads. The expanding number of low-speed vehicles in use will provide opportunities for sales of components and parts in the aftermarket.

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Sample Text, Table & Chart

EXTERIOR & STRUCTURAL PRODUCTS AFTERMARKET

Windshield Wipers

Demand for windshield wipers in the light vehicle aftermarket in China will increase 18.1 percent from 2009 to 2014, reaching 1.4 billion. The ongoing expansion of the road network has a direct influence on windshield wiper demand. The increasing number of vehicles on the road, increasing traffic density, and the growing number of vehicles along street (instead of parking lots) have led to more damaging sunlight, leading to an increase in the demand for wipers. The rising number of vehicles on the road, both front and rear wipers will also provide opportunities for aftermarket demand.

Windshield wipers are designed to clear the vehicle's windshield from rainwater, other precipitation and debris, providing drivers with a maximum view of the road. A windshield wiper often consists of windshield wiper arm, wiper blade, wiper motors, a system of gears and various arms and linkages.

Windshield wiper arms connect the motor to the wiper blades, making the system functional. Also, the windshield wiper arms push the blades to the windshield, increasing their efficiency of keeping the glass clean. There are two popular types of arms sold in China. Radial types, also known as pivot wipers, are attached to a single arm, which in turn is attached to the motor. They are most commonly found on automobiles and light trucks. Pantograph wipers have two arms for each blade, with the blade assembly itself supported on a horizontal bar connecting the two arms. Pantograph arms allow the blade to cover more of the windshield on each wipe. They are more often used on commercial vehicles.

Demand for windshield wiper blades will be supported by the high frequency of product replacement. Windshield wiper blade replacement is a common maintenance task for vehicle owners.

**SAMPLE
TEXT**

TABLE VI-1

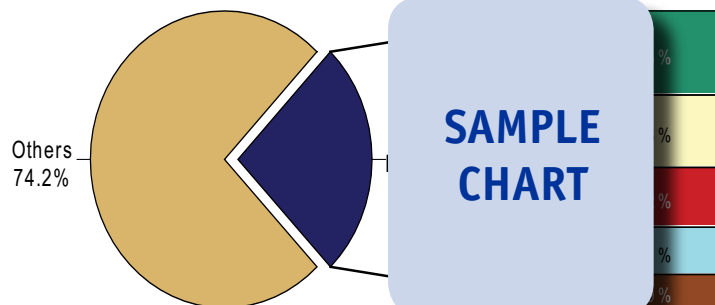
AUTOMOTIVE ELECTRICAL PRODUCT AFTERMARKET IN CHINA (million yuan)

Item	1999	2004	2009	2014	2019
Light Vehicles in Use (000)					
¥ electrical products/vehicle					
Electrical Product Aftermarket					
Batteries					
Ignition Systems & Parts					
Lighting Equipment					
Spark Plugs					
Charging Equipment					
Other					
% electrical products					
Total Automotive Aftermarket	12				0

**SAMPLE
TABLE**

CHART X-1

AUTOMOTIVE AFTERMARKET MARKET SHARE BY COMPANY IN CHINA, 2009 (71.1 billion yuan)

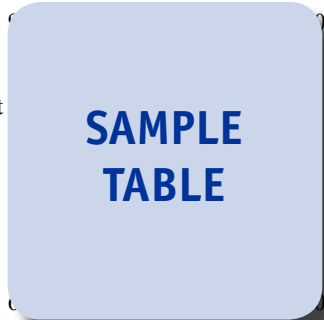


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-3
AUTOMOTIVE BRAKE PARTS & ASSEMBLIES
AFTERMARKET IN CHINA
 (million yuan)

Item	1999	2004	2009	2014	2019
Light Vehicles in Use (000)					
¥ brake parts & assemblies/vehicle					
Brake Parts & Assemblies Aftermarket					
Cylinders & Calipers					
Drums & Rotors					
Shoes, Pads & Linings					
Other Brake Parts					
% brake parts & assemblies					
Mechanical Product Aftermarket					



COMPANY PROFILES

Geely Automobile Holdings Limited
 Room 2301, 23rd Floor
 Great Eagle Centre
 23 Harbour Road, Wanchai
 Hong Kong
 85-2-2598-3333
 http://www.geely.com

Sales: ¥ 7 billion
 [US\$]
 Employed: 10,000

Key Products: cars, SUVs, trucks, systems, electric power steering, and aftermarket vehicle repair

International Contact: Mr. Gui Sheng Yue, Chief Executive Officer

Geely Automobile produces and markets automobiles, automobile parts and related components throughout Hong Kong and China. The Company is 58-percent owned by Proper Glory Holdings Incorporated (Hong Kong), a holding company.

The Company participates in the Chinese automotive aftermarket industry through several subsidiaries, which are engaged in the research, development, manufacture and sale of automobiles under the GEELY, MAPLE, GLEAGLE, EMGRAND and ENGLON brand names; and related automobile components, including engines, gear-boxes, brake systems and electric power steering units. Geely Automobile conducts manufacturing operations at facilities in Lanzhou, Jinan, Chengdu, Xiangtan, Shanghai, Cixi, Ningbo, Luqiao and Linhai, China.

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“Demand for brake calipers and cylinders in the Chinese light vehicle aftermarket is projected to increase 17.7 percent annually through 2014, reaching ¥4.6 billion. Growth will benefit from the expanding size of the light vehicle park and increasing traffic congestion in many cities. Additionally, gains will be aided by the growing number of aging vehicles. The popularity of sport utility vehicles (SUVs) and multiple-purpose vehicles (MPVs) will also provide sales opportunities, ...”
 --Section IV, pg. 64



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OTHER STUDIES

Motorcycles in China

Demand for motorcycles in China will grow 7.6% yearly through 2014. Electric motorcycles will surpass gas types as the largest segment in units. New regulations for electric motorcycles will favor lighter vehicles such as mopeds while discouraging electric scooters and three-wheeled trikes. This study analyzes the 117 billion yuan motorcycle industry in China, with forecasts for 2014 and 2019 by product, market and geographic region. It also evaluates company market share and profiles industry participants.

#2658 September 2010..... \$5300

Automotive Aftermarket in North America

The aftermarket for light vehicle components in North America will increase 2.9% annually through 2014. Mechanical products will remain the largest category while electronics grow the fastest. The dominant professional service provider segment will outpace the DIY market. This study analyzes the \$66 billion automotive aftermarket in North America, with forecasts for 2014 and 2019 by country (US, Canada, Mexico) and product. It also evaluates company market share and profiles industry participants.

#2606 March 2010..... \$4800

World Rubber & Tire

Global rubber consumption will rise 4.1% yearly through 2013. The Asia/Pacific region will remain the largest and fastest-growing market. Non-tire rubber demand will outpace tire rubber. Tire rubber will continue to benefit from strong growth in Asia, despite a decline in rubber usage per tire. This study analyzes the 22 million metric ton world rubber industry, with forecasts for 2013 and 2018 by type, market, world region and for 30 countries. It also evaluates company market share and profiles industry players.

#2575 January 2010 \$5900

World Light-Duty Green Vehicles

Global "green" vehicle demand will grow rapidly through 2013, driven by government subsidies, technology breakthroughs and erratic oil prices. North America will remain the largest and fastest growing market. Conventional hybrid-electric vehicles will surpass natural gas types to become the most commonly sold. This study analyzes the 1.8 million unit world green vehicle industry, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates market share and profiles industry players.

#2510 August 2009..... \$5700

Medium- & Heavy-Duty Truck Aftermarket

The US aftermarket for medium- and heavy-duty (MD/HD) truck parts will grow 3.8% annually through 2013. Exterior and structural components such as tires will remain the largest segment, while electrical and electronic components see the fastest gains. Outsourced service providers will continue to dominate, led by tire dealers. This study analyzes the \$14.2 billion US MD/HD aftermarket, with forecasts for 2013 and 2018 by product and service performer. It also evaluates market share and profiles industry players.

#2481 April 2009 \$4600

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