

China Automotive Industry Yearbook 2011

- Automotive Parts -

- Moving from Growth to Maturity Stage in China,
Electrification, Lightweighting as well as Cost Competitiveness Needed for Auto Parts Makers-

■ Size A4: 240 pages + Supplier Directory in Excel Format ■ Scheduled Publication Date: May 31, 2011
■ Price: 120,000JPY (free shipping but VAT for Japan orders)

- ◆ Identifies the direction of the Chinese automotive industry based on analysis of growth strategies of China's central and local governments
- ◆ Analyzes parts procurement strategies and in-house parts production systems of 16 local and foreign automakers
- ◆ Clarifies trends of new technology development, recruitment strategy and business relationships in 40 major areas of the auto parts industry
- ◆ Analyzes business managements of 50 domestic and 50 foreign automotive parts manufacturers

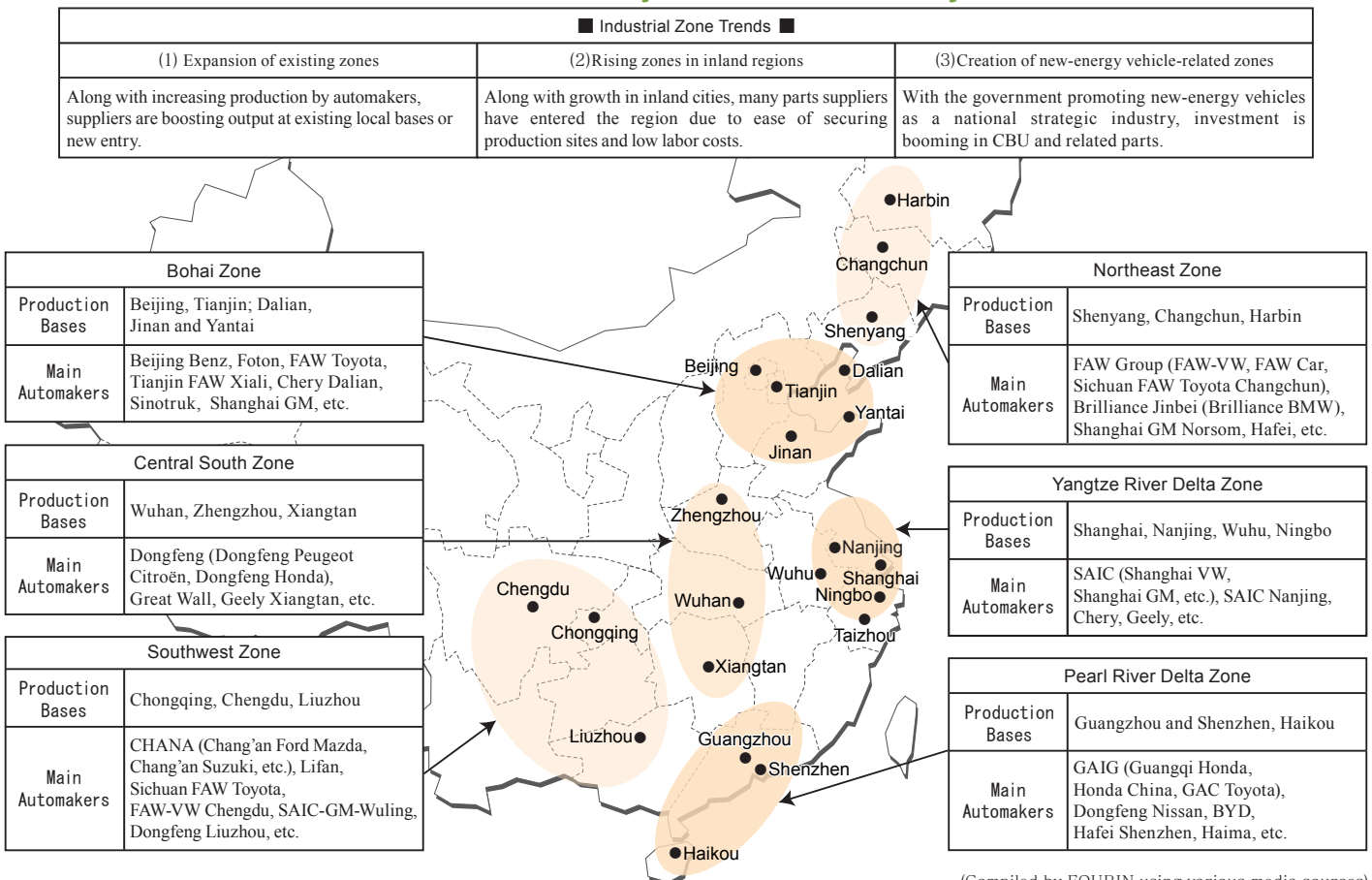
In 2010, the Chinese automotive market is expected to be close to the world's highest recorded vehicle sales of 17.8 million units achieved by the United States and become the auto powerhouse of the world both in name and reality in 2011. Comparing with China's production volume of 2.35 million units in 2001 when China became a member of the WTO, the Chinese automotive industry achieved astounding growth with unprecedented rapidity, recording seven-fold expansion in less than 10 years. Needless to say, the auto parts industry has also achieved explosive growth. In China, while the amount of foreign investment allowed in joint venture projects of complete vehicle manufacturers is limited to 50%, there is no restriction on the

joint venture projects of automotive components. Consequently, the development of the Chinese parts industry was carried out by foreign companies and joint venture companies between Chinese and foreign suppliers, while Chinese suppliers became lagging behind in technology and R&D. However, recently, as seen in the acquisitions of Delphi Corporation's brake and chassis business and GM's Nexteer steering components unit by Chinese enterprises, there are an increasing number of Chinese suppliers that intend to fill the technological gap through takeover of foreign parts makers backed by the governmental supports. Furthermore, with an aim to make up for delay in technology accumulation in the auto parts industry, the Chinese

government has been activating implementation of industrial policies to support and encourage development of technology and products in new technology areas such as electric vehicles and related parts.

It is firmly believed that this survey on the up-to-the-minute trends of the Chinese auto parts industry which clarifies the Chinese government's industrial policies for 2015 as well as deep analysis on parts procurement strategies and business trends of Chinese and foreign auto parts makers will serve as an invaluable source of information for those conducting business related to China's automotive industry, and contribute to further business expansion.

China: Outline of Six Major Automotive Industry Zones



(Compiled by FOURIN using various media sources)

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Chapter One: The Status Quo and Focal Points of the Chinese Auto Parts Industry

- 1) Overview of the Chinese Auto Parts Industry
- 2) The Chinese Auto Parts Industry which Supports the World's Largest Auto Market
- 3) Policies on the Development of the Chinese Auto Parts Industry
- 4) Parts Procurement Strategies of Chinese Suppliers in the Area of Electrification
- 5) Export and Import of Auto Parts
- 6) Analysis of 150 Parts

Chapter Two: Procurement Policies and Trends of Major Automakers

<Chinese Automakers>

- | | | |
|------------------------|---------------------|-------------------|
| 1) SAIC | 2) FAW | 3) Dongfeng Motor |
| 4) Chang'an Automobile | 5) Chery Automobile | 6) BYD Auto |
| 7) Geely Automobile | 8) Great Wall Motor | |

<Foreign Automakers>

- | | | |
|--------------------|------------------|-----------|
| 9) VW Group | 10) PSA | 11) GM |
| 12) Ford/Mazda | 13) Toyota Group | 14) Honda |
| 15) Renault/Nissan | 16) Hyundai/Kia | |

Chapter Three: Business Conditions of 40 Major Chinese Auto Parts Makers

- | | |
|--|---|
| 1) Beijing Hainanchuari Automotive Parts Co., Ltd. | 21) Nanjing Aotecar Refrigerating Co., Ltd. |
| 2) Shandong Binzhou Bohai Piston Co., Ltd. | 22) Qingte Group Ltd. Corp. |
| 3) Hubei Bothwin Investment Co., Ltd. | 23) GSK Group |
| 4) Changchun Xuyang Industry (Group) Co., Ltd. | 24) Ruili Group Ruian Auto Parts Co., Ltd. |
| 5) Dicastal Group | 25) Sanhua Holding Group |
| 6) Shanxi Datong Gear Group Co., Ltd. | 26) Shandong Gold Phoenix Group Corp. |
| 7) Desay Electronics (Huizhou) Co., Ltd. | 27) Shaanxi Hande Axle Co., Ltd. |
| 8) East JoyLong Motor Airbag Co., Ltd. | 28) Tianrun Crankshaft Co., Ltd. |
| 9) Tong Yang Industry Co., Ltd. | 29) Tempo Motor Group Co., Ltd. |
| 10) Fengfang Co., Ltd. | 30) Wanfeng Auto Holding Group Co., Ltd. |
| 11) Fuyao Group | 31) Zhejiang Wanier Transmission Co., Ltd. |
| 12) Shenzhen Hangshen Electronics Co., Ltd. | 32) Wanxiang Group Corp. |
| 13) Huaxiang Group | 33) Weifang Huadong Diesel Engine Co., Ltd. |
| 14) Huayu Automotive Systems Co., Ltd. | 34) Wuxi Weifu Group Co., Ltd. |
| 15) Jinheng Automotive Safety Technology Holdings Ltd. | 35) Liaoning Xinfeng Enterprise Group Co., Ltd. |
| 16) Dragon Hill Wuling Automobile Holdings Ltd. | 36) Xinyi Group |
| 17) Lingyun Industrial Corp. Ltd. | 37) Yapp Automotive Parts Co., Ltd. |
| 18) Lioho Machine Works, Ltd. | 38) Zhejiang Asia-Pacific Mechanical & Electronic Co., Ltd. |
| 19) Luoyang LYC Bearing Corp. | 39) Changchun Faway Automobile Components Co., Ltd. |
| 20) Minth Group Ltd. | 40) Yuchai Group |

Chapter Four: Business Conditions of 10 Major Chinese Auto Parts Suppliers Related to Electrification

- | | |
|---|---|
| 1) China Tex Mechanical & Electrical Engineering Ltd. | 6) Tianjin Lishen Battery Joint-Stock Co., Ltd. |
| 2) CSR Corp. Ltd. | 7) Tianjin Qingyuan Electric Vehicle Co., Ltd. |
| 3) Ningbo Yunsheng Co., Ltd. | 8) Sky Energy (Luoyang) Co., Ltd. |
| 4) Shanghai Dajun Technologies Inc. | 9) Wanxiang EV Co., Ltd. |

5) Shanghai Edrive Co., Ltd.

10) Citic Group

Chapter Five: Business Trends of 50 Major Global Parts Makers in China

<30 Western Parts Makers>

- | | |
|-------------------|---------------------|
| 1) Bosch | 16) GKN |
| 2) Delphi | 17) Goodyear |
| 3) Magna | 18) Hella |
| 4) Schaeffler | 19) Johnson Control |
| 5) ArvinMeritor | 20) Lear |
| 6) Asimco | 21) Magneti Marelli |
| 7) Autoliv | 22) Mahle |
| 8) BorgWarner | 23) MANN+HUMMEL |
| 9) Cummins | 24) Michelin |
| 10) Siemens | 25) Tenneco |
| 11) Eaton | 26) TRW |
| 12) Faurecia | 27) Valeo |
| 13) Federal-Mogul | 28) Visteon |
| 14) Freudenberg | 29) WABCO |
| 15) Getrag | 30) ZF |

<16 Japanese Parts Makers>

- | | |
|----------------------------------|-----------------------|
| 31) Aisin Group | 39) Takata |
| 32) Denso Group | 40) Tokai Rika |
| 33) JTEKT | 41) Toyoda Gosei |
| 34) Hitachi | 42) Toyota Industries |
| 35) NTN | 43) Toyota Boshoku |
| 36) Calsonic Kansei | 44) Nidec |
| 37) Jatco | 45) Bridgestone |
| 38) Sumitomo Electric Industries | 46) Yazaki |

<Four Korean Parts Makers>

- | | |
|-------------------|------------------|
| 47) Hyundai Mobis | 49) Hankook Tire |
| 48) Mando | 50) Kumho Tire |

Chapter Six: Statistical Data

1. China: Vehicle Production and Factory Shipment by Type and Segment (2004-2010)
2. China: Passenger Car Production and Factory Shipment by Origin and Brand (1998-2010)
3. China: Passenger Car Production and Factory Shipment by Maker and Model (1998-2010)
4. China: Vehicle Production and Factory Shipment by Maker and Type (1998-2010)
5. China: Vehicle and Parts Trade (Import and Export) by HS Code and Item (2005-2010)

Attachment CD in Excel Format

1. Directory of Chinese Automakers and Parts Makers (Approx. 6,000 enterprises)
2. F-1: China: Vehicle Production and Factory Shipment by Type and Segment (2004-2010)
- F-2: China: Passenger Car Production and Factory Shipment by Origin and Brand (1998-2010)
- F-3: China: Passenger Car Production and Factory Shipment by Maker and Model (1998-2010)
- F-4: China: Vehicle Production and Factory Shipment by Maker and Type (1998-2010)
- F-5: China: Vehicle and Parts Trade (Import and Export) by HS Code and Item (2005-2010)

*Please note that changes may be made to the final content of this publication.

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