

China's Automotive Engine Electronics Industry Study, 2005-2006

Description: Compared to the 2004 sluggish situation, the Chinese domestic automotive market grew steadily in 2005. Car sales reached 296,800 units in June, setting a new record. In particular, the sales of intermediate and low-end cars showed a sharp increase in the first half of 2005. There is a cumulated sale of 2,256,511 cars in the first ten months of 2005, a 25.05% increase year-on-year. Sales volume of passenger cars manufacturers in November is climbing with an average increase of 10% compared to the same period last year, now making November the third sales peak after June and September.

As the automotive market is becoming more and more mature, consumers now pay attention to car performances, technology and safety, rather than prices when they purchase cars. And automotive electronics plays an important role in those respects. Besides, the government has implemented new policies for the automobile industry, and is increasingly considering independent development of automotive electronics, especially for engine electronics.

Automotive electronics requires stricter application conditions than general electronics, because of temperature for example. Meanwhile, automakers have different requirements for their automotive electronics, which means auto electronic manufacturers had to invest a lot. In addition, the fragile foundation of automotive electronics on China's mainland, to a great extent, prevents a further expansion of the auto electronic market.

Auto electronic products also face problems such as long product life cycles as well as long systematic developments. In a general sense, the development period and life cycle for common consumer products are three months and six months respectively, but for automotive electronics products they are three years and ten years respectively. So, it is difficult for automotive electronics to catch up with technological innovations of the IT industry.

Currently, thousands of Chinese domestic auto electronic enterprises specialized in products with low technical contents such as automotive audio systems, in-car telephones and navigation. However, the core automotive electronics such as engine electronics and chassis electronics are almost monopolized by foreign vendors or joint ventures.

However, the Chinese domestic enterprises still have opportunities thanks to high market demand with political support, enforcement of supplementary measures and perfection of laws, rules & regulations.

Newly implemented development policies for China's automobile industry consists of encouraging independent development, enhancing international competitiveness, developing auto-making rather than auto-assembly, embodying national benefits, and subscribing to the principle that Chinese sides hold at least 50% shares of joint ventures, which undoubtedly gives incentive to independent development of China's automobile industry and engine electronics.

Nowadays, independent development of electric-control fuel injection system can technically meet Euro emission standards. The development of electric-control engines corresponds to the development of electric-control fuel injection systems. Developing electric-control engines independently requires a good command of electric-control fuel injection technologies. The industrialization of electric-control fuel injection system is inevitable. So, this report suggests that those who leap ahead will enjoy advantages in market competition in the future.

Currently, the majority of automotive engine electronics products are imported into China at a high price, which is in contradiction to policies for China's automobile industry and increases cost for automakers. Accordingly, most global giants are increasingly localizing production in order to precede China's future political control on localization rate, and in order to consolidate their position for further expansion in Chinese market.

The Chinese government pays a lot of attention to the automobile industry as well as to auto electronics and implemented various policies to help domestic automotive electronic enterprises to

grow. As with car manufacturing, private automakers, such as Chery and Geely, succeeded in breaking the monopoly of overseas giants in China's automobile market. This gave an incentive to some domestic manufacturers to seize great opportunities in the automotive electronics field.

The world-leading engine manufacturers gained their position in the automobile industry thanks to huge investment in R&D and continuous technological innovation. But even if technological breakthroughs were made, the practical and urgent matter is how to put them into production and whether they can be accepted by the market. Thus, developing China's own engine industry requires not only huge investments and the government's support but also the cooperation of different industry chains.

The report gives a detailed description of the past, current status and future forecast of the automotive engine electronics industry; presents an in-depth analysis of market demand, environments, prospects of the automotive engine electronics industry; compares automotive engine electronic manufacturers, their competitive patterns and their latest developments; forecasts the current status and development of automotive engine electronic technologies. The report also analytically summarizes the government's policies and attitudes towards the automotive engine electronics industry.

This report is modified at the time of ordering and requires 3-5 days to deliver.

Contents:	Chapter One: Current status of China's automotive market in 2005
	Chapter Two: Engine manufacturers in China
	2.1 Engine manufacturers in 2004
	2.2 Engine manufacturers from Jan to Oct in 2005
	Chapter Three: Overview of engine electronic industry
	3.1 Current status of engine electronic market
	3.2 Current status of engine electronic technologies
	3.3 Development trend of engine electronic industry
	Chapter Four: Engine electronic classification and market
	4.1 Engine Management System (EMS)
	4.2 Electronic fuel injection system
	4.3 Electronic ignition system
	4.4 Electronic power control system
	4.5 Electronic control variable displacement system
	4.6 Electronic control variable volume intake system
	4.7 Variable valve timing and lift electronic control system
	4.8 Electronic control EGR (exhaust gas recirculation)
	4.9 Electronic control electric-drive fan
	4.10 Electronic Control Unit (ECU)
	4.11 Sensor
	Chapter Five: Foreign automotive engine electronic manufacturers
	5.1 Delphi
	5.2 BOSCH
	5.3 Visteon
	5.4 DENSO
	5.5 Valeo
	5.6 Siemens
	5.7 Motorola
	5.8 Infineon
	5.9 Renesas
	5.10 Philips
	5.11 NEC
	5.12 Texas Instruments
	5.13 STMicroelectronics
	5.14 Toshiba
	5.15 Hitachi
	5.16 FUJITSU

- 5.17 Honeywell
- 5.18 Cummins
- 5.19 Perkins
- 5.20 IVECO
- 5.21 Magnetimarelli
- 5.21 Other companies
- 5.21.1 International Truck and Engine Corporation
- 5.21.2 Mitsubishi

Chapter Six: Opportunities and challenges

- 6.1 Analysis on market demand
- 6.2 Analysis on market environments
 - 6.2.1 Engine electronic technologies monopolized by overseas enterprises
 - 6.2.2 Domestic enterprises centralized in low value-added products
- 6.3 Analysis on development prospects
 - 6.3.1 Internal drive of industrial competition
 - 6.3.2 External drive of energy conservation and environmental protection
 - 6.3.3 Immense promotion by technological progressing
- 4.3.4 Driving effect of political support

Chapter Seven: Conclusive suggestions

- 7.1 Conclusive suggestions for overseas manufacturers
 - 7.1.1 Advantages of overseas manufacturers
 - 7.1.2 Challenges faced by overseas manufacturers
 - 7.1.3 Development suggestions for overseas manufacturers
- 7.2 Conclusive suggestions for domestic manufacturers
 - 7.2.1 Disadvantages of domestic manufacturers
 - 7.2.2 Advantages of domestic manufacturers
 - 7.2.3 Development suggestions for domestic manufacturers

Selected figures and tables

- Prediction of demand and on-road volume of vehicles during 2005-2020
- Average car price in domestic market during 2004-2005
- Comparison of imports and exports during 2004-2005
- Output proportion of domestic automotive engine manufacturers during Jan to Oct of 2005
- Sales proportion of domestic automotive engine manufacturers during Jan to Oct of 2005
- Production value trends of global automotive electronics market during 2002-2010
- Market size of China's automotive engine electronics market during 2003-2007
- Market shares of major domestic EMS manufacturers in 2004
- Working principle of electronic control variable displacement system
- Working principle of electronic control variable volume intake system
- Working principle of electronic control EGR
- Global market Scale of auto sensors during 2000-2005
- Sales performance of Beijing Delphi Wanyuan Engine Management Systems during 2003-2005
- Sales performance of United Automotive Electronic Systems Co., Ltd during 2003-2005
- Sales performance of Tianjin DENSO Electronics Co., Ltd during 1998-2004
- Market Shares of Renesas MCU worldwide
- Sales performance of Magneti Marelli Powertrain (Shanghai) Co., Ltd during 2003-2005
- Market demand of car electric fuel injection system in China during 2000-2005

Ordering:

Order Online - <http://www.researchandmarkets.com/reports/519672/>

Order by Fax - using the form below

Order by Post - print the order form below and sent to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,

Ireland.

Fax Order Form

To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit

<http://www.researchandmarkets.com/contact/>

Order Information

Please verify that the product information is correct and select the format(s) you require.

Product Name: China's Automotive Engine Electronics Industry Study, 2005-2006
Web Address: <http://www.researchandmarkets.com/reports/519672/>
Office Code: OC8HIIKTPRRXU

Product Formats

Please select the product formats and quantity you require:

	Quantity	
Hard Copy:	<input type="checkbox"/>	EURO €847.00 + Euro €50.00 Shipping/Handling *
Electronic:	<input type="checkbox"/>	EURO €917.00

* Shipping/Handling is only charged once per order.

Contact Information

Please enter all the information below in **BLOCK CAPITALS**

Title: Mr Mrs Dr Miss Ms Prof

First Name: _____ Last Name: _____

Email Address: * _____

Job Title: _____

Organisation: _____

Address: _____

City: _____

Postal / Zip Code: _____

Country: _____

Phone Number: _____

Fax Number: _____

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)

Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

- Pay by credit card:
- American Express
- Diners Club
- Master Card
- Visa

Cardholder's Name _____

Cardholder's Signature _____

Expiry Date _____ | _____

Card Number _____

CVV Number _____

Issue Date _____ | _____

(for Diners Club only)

- Pay by check:

Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

- Pay by wire transfer:

Please transfer funds to:

Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
 27-35 Main Street,
 Blackrock,
 Co. Dublin,
 Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: _____

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at <http://www.researchandmarkets.com/info/terms.asp>

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353 1 481 1716 or +353 1 653 1571 - From Rest of World