



The global market for automotive heating, ventilation and air conditioning: 2006 edition



Brand new research on the automotive HVAC sector

This report highlights the findings of research conducted throughout 2005 by ABOUT Automotive in the automotive air conditioning market. It is largely based on our research and analysis and interviews with a number of industry experts, gathering individual perspectives.

The study updates and extends our first analysis of this sector, published in November 2001 and 2003, providing some insights in a number of areas, including:

- The market for automotive climate control, determining the trends and topical issues;
- The main manufacturers serving this sector, identifying how the market is divided in terms of market share and value on a regional basis;
- Trends in key product and process technologies, both current and future; and
- OEM trends and rationale in adopting different types of climate control.

The report provides answers to such vital questions as:

- Why is automotive HVAC switching to the use of carbon dioxide as a refrigerant? What does this mean for the leading suppliers?
- What are OEMs' primary requirements of their HVAC suppliers?
- What are the market shares of the leading companies, and why is the market OEM driven, as opposed to market driven?
- Despite the maturity of the market in Japan and North America, why will the technical boundaries of air conditioning systems continue to be pushed back?
- What will happen to the global market when the EU mandates the introduction of CO2-based HVAC from 2011? How will installation rates be affected – especially in smaller car segments?

Report coverage

Chapter two sets out our forecast for global OE sales of air conditioning systems through 2008 and includes coverage on a regional basis, including Europe, Japan, Asia-Pacific, North America and South America. It also identifies the market leaders for HVAC in each region, comparing how their positions have changed over the last two years as well as some market value estimates for the OE air conditioning market in each world region, forecasting through 2010. We also present some more detailed analysis of the fitment of automatic climate control systems to all car segments in Europe.

We take a look at the design and installation of HVAC systems in platform based vehicles, such as Volkswagen Group's PQ 35 cars.

In addition, we examine the increasing number of OEMs offering HVAC systems as a no-cost option to incentivise consumers. We analyse the impact this has on cost and volumes for suppliers; the effect on consumer expectations; and the impact that the shift to CO2 may have on this marketing strategy.

Chapter three reviews the technical advances in vehicle air

conditioning during the last decade, reviewing the effects on the industry following the switch to CO2 (carbon dioxide) as a refrigerant in air conditioning systems. In fact, Denso is one of a few major suppliers developing CO2-based systems, which have less impact on the environment than ozone-damaging fluorocarbons. Developers say the systems will also be more efficient, thereby drawing less power from the engine, and can be doubled as heat-pumps, providing heat that could help diesel engines warm up faster, or provide extra heating in small cars. Opinions are mixed as to how soon mass-market CO2 air conditioning units could be seen, and critics say there remain many challenges regarding the cost, weight, reliability, servicing and maintenance of such new systems.

Chapter four provides brief profiles of the major automotive air conditioning equipment manufacturers:

- Behr
- Behr-Hella Thermocontrol
- Calsonic Kansei
- Delphi Corp
- Denso
- Valeo (and Zexel alliance)
- Visteon

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