China Electronic Fuel Injection (EFI) System Report, 2015-2018

Description:

In 2002, China's gasoline engines saw an end of the application of carburetor and ushered in an era of electronic fuel injection. Starting from July 1, 2008, the implementation of National III emission standards prompted diesel engines to use electronic control. Thus, the vehicles in China have fully achieved electronic fuel injection control. On January 1, 2015, China began to comprehensively implement National IV emission standard, which has once again upgraded engine fuel electronic control.

In the field of gasoline electronic injection, the market focuses on gasoline direct injection (GDi) and hybrid injection.

At present, quite a few models of Beijing Benz, Shanghai Volkswagen, Shanghai GM, and FAW-Volkswagen are equipped with GDi, with the market size for 2015 of an estimated 4.03 million sets, up 19.23% from a year earlier. It is estimated that in 2018 the demand will reach 6.81 million sets.

Hybrid injection can make up for the weakness of GDi and was first applied in Highlander, Camry, and Audi Q5 in China. But hybrid injection needs two injection systems equipped simultaneously. In addition, fuel injection conversion need to change control system strategy, hence the need for high costs. In future, hybrid injection is expected to be widely used in high-grade vehicles with low sensitivity to price.

In the field of diesel electronic injection, the market is mainly targeted at high pressure common rail and passenger vehicle dieselization in 2015.

With the implementation of the national IV emission standard, as the most suitable technology roadmap, common rail system for diesel engines witnessed rapid development. In May and June 2014, the mainstream Chinese heavy and light-duty truck manufacturers signed letters of commitment, vowing not to sell models that fail to meet emission standards, which, to a great extent, helped improve assembly rate of high pressure common rail system.

With excellent performance in energy conservation and emission reduction, diesel-powered models have been widely recognized in the global automobile market. Made in China 2025, released by China in May 2015, said that the Government will press ahead with the application of diesel engines in passenger vehicles. At present, some automakers have kicked off diesel vehicle project. In the future, with the development of diesel-powered passenger vehicles, the proportion of high pressure common rail system equipped in passenger vehicles is expected to rise.

In terms of competitive landscape, whether gasoline electronic injection or diesel electronic injection is dominated by foreign players. Gasoline electronic injection suppliers include United Automotive Electronic Systems Co., Magneti Marelli, Valeo, and Donguan Keihin, etc. Diesel electronic injection market is monopolized by Bosch, Denso, and Delphi. And other local companies are only in the process of small-batch production or R&D stages.

WeiFu High-tech, the most important fuel injection system supplier in China, mainly produces fuel injection systems for diesel engines, including injection pumps, injection nozzles, delivery valves, plunger & barrel assy, and common rails. In the first half of 2015, affected by the downturn in heavy-duty trucks and the conversion of national IV standards, WeiFu High-tech experienced a 24.46% fall in fuel injection business. Meanwhile, as the demand for high-pressure common rail increased, the rough machining business of common rail pumps and fuel injectors supplied to Bosch Automotive Diesel Systems Co. grew significantly. In 2015, WeiFu High-tech began to construct workshops of Weifu Industrial Park Phase II. When the first and second phases of the project are completed, the company will achieve a capacity of 810,000 sets/a high pressure common rail pumps and 100,000 sets/a diesel engine WAP2 system.

China Electronic Fuel Injection (EFI) System Report, 2015-2018 by ResearchInChina mainly focuses on the following:

Chinese policies about automotive EFI system, status quo and forecast of market demand, and import & export;
Status quo and forecast of China gasoline EFI system market size and structure, and supply relationship of
key enterprises;
China diesel EFI system market size and structure, technology roadmap, and the development of major enterprises;
Main EFI products, operation, development, etc. of foreign companies;
Main EFI products, operation, development, etc. of Chinese companies.

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