



**Global and China Automotive Seating System
Industry Report, 2010-2011**

Jun. 2011

This report

- ◆ **Analyzes the global and China automobile industry.**
- ◆ **Focuses on the global and China automotive seating system industry.**
- ◆ **Highlights the operation of automotive seating system manufacturers.**

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Abstract

The seemingly inconspicuous seating system is merely inferior to engine in the automotive cost structure. The average price of common car seats is around US\$850-1,050, that of medium grade ones US\$1,400-1,600 or so, and that of top-grade ones over US\$2,000. The seating system turns out to be more expensive than gear box, chassis, and auto body to most of the cars.

The automotive seating system mainly consists of cushion frame, back frame, slide channel, covering, pad assy, recliner assy, and motor. The frames and the slide channel are usually obtained via the laser welding of high strength steels and they ask for excellent metal processing technology. Pad assy requires superb chemical preparation technology, electric control and order recall need electronic technology, and covering demands textile technology; consequently, there are few manufacturers of automotive seating assembly and the threshold is very high.

Revenue of Global Major Manufacturers of Seating System for Passenger Vehicles , 2010 (million USD)

JC	13,114
LEAR	9,395
TOYOTA BOSHOU	8,888
FAURECIA	5,758
TS	4,074
TACHI-S	2,493
BROSE	1,218
MAGNA	1,008
DYMOS	560
OTHERS	7,280

The global automotive seating manufacturers fall into American, Japanese, and European factions. The America-based manufacturers are mainly composed of JC and Lear. As the world's largest manufacturer of automotive seating system, JC enjoys absolute superiority in pad assy technology and global presence. It possesses rich cash flow and improves its industry chain through purchasing small producers.

JC accomplished three acquisitions from November 2010 to January 2011. In Nov., 2010, JC purchased Michel Thierry, the supplier of automotive seat textile fabrics for JC; in December 2010, JC acquired the component business of Keiper, the inventor of seat recliner assy, and the seating business of Recaro famous for top-grade automotive seating system; and in January 2011, JC bought the supplier of metal frames for automotive seating system named CRH whose major customers are manufacturers of luxury vehicles.

Lear started its business with seating fabrics, its industry chain is highly integrated, and the major clients cover GM, Ford, and Audi, who contribute more than 50% to its revenue.

The Japanese manufacturers include Toyota Boshoku, TS, and TACHI-S; wherein, the former two thrive from seating fabrics, while the latter grows from seating spring. Toyota Boshoku mostly supplies for Toyota; 74% automotive seating systems of Honda are provided by TS; and the major clients of TACHI-S are

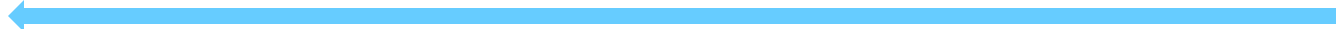
Nissan and Honda.

The European manufacturers consist of French Faurecia and German Brose. Engaged in medium & high-grade cars, Faurecia acquired Seat Comfort Segment of German Hoerbiger in December 2010. It mainly serves Audi A8 & A7, BMW 7 series, Bentley 831/621, and Benz S series, all are luxury cars priced over RMB 1 million.

Brose, the largest manufacturer of electric seat adjustor and the second largest manufacturer of door-lock system in Europe, takes the lead worldwide in the fields of electric window winder, auto door system, ABS motor and air conditioner fan assembly, but it deals with small quantities of seat assembly.

In addition, the automotive seating manufacturers cover South Korean DYMOS and HANIL E-HWA; wherein, the former also provides gear boxes for South Korean Tanktech, and the latter gives priority to trim.

All the automobile manufacturers in China except BYD adopt the seating systems of joint ventures, and BYD also needs to purchase key components. The automotive joint ventures in China are mostly controlled by the foreign parties, and may eventually develop into sole proprietorships. The joint ventures of foreign-funded automotive enterprises in China are mainly the branch companies with the highest profit margin. Take Toyota Boshoku as an example: its operating margin in Japan is 1.2%, while that in China is as high as 13.6%. China has contributed over 80% to the profit of Toyota Boshoku.



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