



Global and China Automotive Safety System Industry Report, 2010-2011

Oct. 2011

This report

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

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Abstract

From January to August 2011, China produced 11,855,000 and sold 11,984,000 automobiles, up 3.04% and 3.33% year on year respectively. Specifically speaking, China produced 9,210,000 and sold 9,218,000 passenger cars, up 6.39% and 6.05% year on year respectively; China produced 2,645,000 and sold 2,765,000 commercial vehicles, down 7.16% and 4.81% year on year respectively.

Although the growth rate in Jan.-Aug. 2011 was much lower than that in the same period of 2010, China remains the world's largest automobile market. Chinese automobile market is undergoing structural changes, and medium and high-class sedans (especially luxury sedans) sell well.

From January to August 2011, Audi's global sales volume reached 853,000, up 17.4% year on year. Its sales volume was 152,800, 142,300 and 65,400 in China, Germany and the United States respectively, up 28.6%, 15.9% and 15.0% year on year separately. China has become Audi's largest market in the world, mainly driven by the purchase of the government with public funds.

From January to August 2011, Mercedes-Benz's global sales volume reached 867,400. Its sales volume was 165,500, 148,400 and 120,200 in Germany, the United States and China respectively, up 2.3%, 6.1% and 35.8% year on year separately.

From January to August 2011, BMW's global sales volume reached 1,073,400, up 16.8% year on year. Its sales volume was 196,300, 155,900 and 158,900 in Germany, the United States and China respectively, up 13.3%, 12% and 49.3% year on year separately.

Unlike luxury cars, economical passenger cars saw decline in the sales volume. Chinese local brands focus on economical passenger cars. In August 2011, China produced 1,393,000 and sold 1,381,100 automobiles, up 6.66% and 8.29% month on month or up 8.72% and 4.15% year on year respectively. However, the sales volume of Chinese local passenger car brands declined to 407,400, down 2.86% year on year.

The development of automotive safety system industry in 2011 is nearly same with that in 2010. The growth rate of the industry leader Autoliv is much higher than the industry average level. Autoliv will gain the revenue of over USD10 billion in 2011, up 13.3%.

The largest market of Japanese manufacturer Takata is the United States instead of Japan. The yen appreciation has led to the decline in the export of Takata. TRW has benefited from the Chinese market. TRW's largest customer is Volkswagen, which accounts for 20% of the revenue of TRW. Volkswagen is growing rapidly in China.

Japanese manufacturers suffer from the yen appreciation. Except Takata, Japanese manufacturers mainly produce seat belts and steering wheels with low technological content and market growth rate.

Revenue and Operating Margin of Global Automotive Safety System Manufacturers, 2009-2011

Manufacturer	Revenue (USD mln), 2009	Revenue (USD mln), 2010	Revenue (USD mln), 2011	Operating Margin, 2009	Operating Margin, 2010	Operating Margin, 2011
Autoliv	7347	9507	10772	1.3%	12.1%	10.0%
Takata	3774	4456	4319	4.2%	6.9%	5.8%
TRW	2904	3557	4168	2.5%	8.2%	8.9%
Toyoda Gosei	1547	1630	1635	2.9%	5.3%	5.8%
Tokai Rika	868	789	708	6.2%	6.1%	6.0%
Nihon Plast	455	575	580	1.7%	4.6%	4.2%
KSS	1008	1120	1280			
Mobis	408	472	528			
Delphi	350					
Other	720	820	758			

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