Global and China Automotive Seating Industry Report, 2011-2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include National Bureau of Statistics of China and CAAM etc.

Abstract

The report highlights the following aspects:

- Brief Introduction to Automotive Seating
- Global and China Automotive Market
- Global Automotive Seating Market
- China Automotive Seating Market
- Major Automotive Seating Manufacturers Worldwide

For a car, it is not the engine or the chassis but the seating that seems to be with little technical content but features the highest cost. The world's top 10 seating manufacturers hold 95% market share of the global automotive seating market.

There are two leading camps in the seating industry: one refers to four Japanese companies, and the other involves five corporations in Europe and America. In particular, the South Korea-based DYMOS is grouped into the latter, since its major partners are Lear and Visteon.

The four Japanese companies are major suppliers for native businesses. Except Toyota Boshoku, all the customers of the rest three including TS, NHK SPRING and TACHI-S are Japan-based enterprises. Due to the devastating Japan 311 earthquake, Thailand flooding as well as the yen appreciation, Japanese corporations encountered decline in revenue in 2011. However, the estimation shows that Japanese businesses, especially TS and NHK Spring will see considerable growth in 2012.

Among the five European and American enterprises, Magna and Lear position their core customers in North America, Faurecia focuses on French and German enterprises as its crucial clients, Brose highlights German customers, while JC's customers are widely spread around the world.

Ranking of Major Automotive Seating Manufacturers Worldwide by Revenue (USD mln)

Manufacturer	2010	2011	2012E
JC	13,114	16,052	16,688
TOYOTA BOSHKOU	9,893	10,763	11,276
LEAR	9,395	10,943	10,989
FAURECIA	5,758	6,440	6,762
TS	3,439	3,231	3,839
MAGNA	2,008	2,558	2,956
TACHI-S	2,493	2,551	2,687
NHK Spring	2,073	2,196	2,512
BROSE	1,218	1,418	1,588
DYMOS	1,263	1,579	1,600

RIC: < Global and China Automotive Seating Industry Report, 2011-2012>

Johnson Controls (JC) tapped into automotive seating market in the wake of the acquisition on Hoover Universal in 1985 and grew into the world's largest automotive seating manufacturer in 2000. In 2011, its revenue from automotive seating reached roughly USD16 billion. YFJC, the China-based joint venture of JC, is regarded as the largest automotive seating manufacturer in China, with the revenue in 2011 up to RMB15.8 billion.

The automotive market of China has shown recovery these days, with the automobile sales volume rising 1.7% YoY to 8.0235 million in Jan.-May, turning around the year-on-year decline in the first four months. In May, the SUV demand maintained robust, with the sales volume surging by 58.4% year-on-year to 162,600; while the growth rate of MPV demand and sales volume improved, with the MPV sales volume in May increasing by 10.9% year-on-year to 40,300. With the successive launch of governmental stimulus package, the automobile industry of China is anticipated to further turn better in the second half of the year.

In China, the automotive seating industry is fully reliant on the import of the technology. Such being the case, Chinese companies only serve as financial investors among joint ventures in the industry. Industrial players, especially Japan-based companies, endeavor to explore Chinese market. For instance, TACHI-S continues to gain orders from Geely; the Xiangfan base of NHK Spring was put into production in May, 2012, and is expected to win more orders from Dongfeng Nissan. By comparison, European counterparts seemingly fall behind. For example, both FAURECIA and BROSE contribute smaller portions in the Chinese market.

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