



**Global and China Automotive Safety System  
Industry Report, 2011-2012**

**Jul. 2012**

## 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, China Association of Automobile Manufacturers and Wind etc .

## Abstract

Automotive safety system falls into two categories: active safety system and passive safety system. The passive safety system industry is quite mature and witnesses minor changes. Airbag industry poses the exceeding high entry barriers and the top three giants dominate the market with a total share of over 95%.

Autoliv is a leading manufacturer in automotive safety system market and focuses on European and American markets. TRW boasts rich product line and derives around 14% of its revenue from automotive safety system. TRW devotes itself to the chassis market and thus sees a slight decline in the market share of automotive safety system. Takata makes up over 70% market share in Japan and achieves good results in Europe-America. In 2012, Mercedes-Benz becomes its third largest customer, and Volkswagen, the fourth largest one.

**Revenue of Automotive Safety System Manufacturers, 2009-2012E (Unit: US\$ mln)**

	2009	2010	2011	2012E
<b>Autoliv</b>	7,347	9,507	11,459	12,166
<b>Takata</b>	3,774	4,456	4,787	5,008
<b>TRW</b>	2,904	3,557	3,752	3,866
<b>Toyoda Gosei</b>	1,547	1,630	1,821	1,787
<b>Tokai Rika</b>	868	789	794	868
<b>KSS</b>	1,008	1,120	1,280	1,160
<b>Mobis</b>	408	472	588	628
<b>Nihon Plast</b>	398	580	607	748

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

The market size of active safety system is still rather limited at present, with the key products consisting of Parking Radar, Infrared Night Vision and Automotive Vision. Parking Radar is the most common one, but it is characteristic of low price and small market size.

The professional automotive radar producers include TTE in Taiwan and comprehensive companies like Bosch and Valeo, etc. The top 3 manufacturers seize roughly 71% market share. TTE ranks No. 3 in the world and will climb up to No. 2 because it has secured the orders from GM for seven years.

Infrared Night Vision is widely applied in luxury cars, and Mercedes-Benz E-Class and BMW 5 Series are equipped with Infrared Night Vision. The second-generation Infrared Night Vision can only detect oncoming vehicles and road users, while the third-generation product will be capable of detecting the oncoming animals. The Infrared Night Vision producers are Autoliv, Bosch and Denso.

Automotive Vision System is still rarely seen and principally employed for automatic parking assist system and crossings alarm system. It will develop towards automatic braking and unmanned driving. Many businesses have been dedicated to the system research and development.

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