China Automotive Electronics Industry Report, 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.

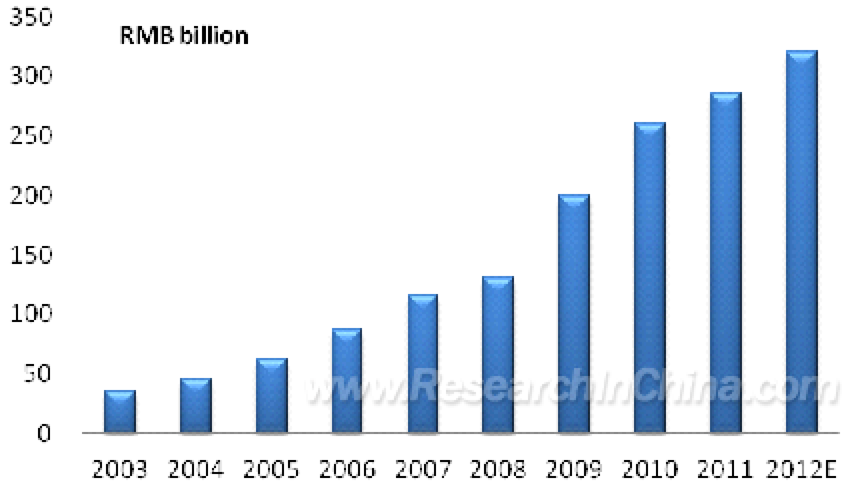
INFORMATION SOURCES

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

Abstract

Following the rapidly growing demand for automobiles as well as the increasing requirements on automotive intelligence, Chinese automotive electronics market has witnessed robust development, with an AAGR of 29.5% in 2003-2011 and market size expected to outnumber RMB320 billion in 2012.

Automotive Electronics Market Size in China, 2003-2012



Source: ResearchInChina; < China Automotive Electronics Industry Report, 2012>

Concerning competitive landscape, foreign and joint-venture companies represented by Continental AG, Bosch, Denso and Delphi hold an absolutely dominant position, of which, Bosch Group enjoyed the biggest market share in 2011, and among the top ten corporations by share ranking, there was merely one local company called Shenzhen Hangsheng Electronics Co., Ltd., which was fixed on in vehicle infotainment system products.

China Automotive Electronics Industry Report, 2012 by ResearchInChina selects two or three major kinds of automotive electronics products each from five categories, i.e. power control system, safety control system, body control system, ride control system and information system for research, and makes analysis on market size, product demand, competitive landscape, development trends, etc..

In terms of the power control system market, engine management system (EMS) is the most important, with market size approximating RMB62.4 billion in 2011. Chinese EMS market is completely occupied by foreign corporations, among which, United Automotive Electronic System Co., Ltd (UAES) under Bosch Group seizes the largest share, followed by Delphi, Continental AG, Visteon, etc..

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With respect to the safety control system, supplemental restraint system (SRS) and anti-lock braking system (ABS) are regarded as representative products of passive safety and active safety respectively. The quantity demand for SRS in China will reach 54.5 million units in 2012, while with the development of the automotive industry, ABS has basically been standard vehicle configuration in China, with matching proportion up to 91.01% in 2011.

As for the body control system, electric window regulator and windshield wiper are involved in the research. As automotive electronic configuration ever improves, electric window regulator has become standard vehicle configuration in China, and induction windshield wiper has also seen a rising ratio of application in automobiles. In the arena of electric window regulator, Shanghai Brose Automotive Components Co., Ltd., Shanghai SIIC Transportation Electric Co., Ltd. and Mitsuba Electric Co., Ltd. occupy a large market share, while Valeo, Bosch and Denso hold a bigger proportion in the windshield wiper market.

In the ride control system, we studied automotive instrument and air conditioning. In the first market, Continental Automotive Wuhu Co., Ltd. and Shanghai Delco Electronics & Instrumentation Co., Ltd. have the largest share, of which, the former primarily supports FAW-Volkswagen, while the latter mainly serves Shanghai Volkswagen and Shanghai General Motors. While in the field of automotive air conditioning, Delphi, Valeo and Sanden possess a larger market share.

Car audio and GPS are the uppermost automotive information system products. In such market, Japanese players such as Clarion, Denso, Pioneer and Alpine take the dominant positions.

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