China Automotive Steering System Industry Report, 2012-2015

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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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

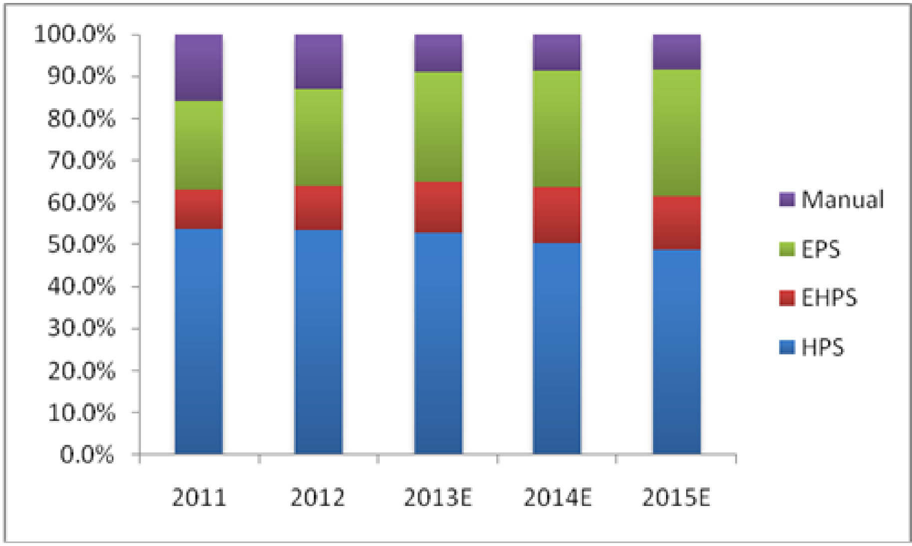
According to the data of China Association of Automobile Manufacturers, China's annual production capacity of automotive steering system has now reached around 20 million sets. In 2012 the demand for automotive steering system in China was approximately 19.31 million sets, a year-on-year increase of 4.3%. It is expected that, in 2013-2015, the demand will grow at an average rate of 5% or so, and hit 22.35 million sets in 2015.

Seen from the demand structure, mechanical hydraulic steering system (HPS) is the most mainstream steering system in the current market, with demand accounting for about 50% of the total. However, as the electric power steering system (EPS) technology continues to become mature, its demand is in a stage of rapid growth. In the future, EPS will constantly replace HPS to become the mainstream of the automotive steering system market.

At present, China's automotive steering system industry characterizes fierce competition, and the manufacturers fall into two camps of foreign-capital / joint-venture enterprises and local enterprises, of which, the former represented by ZF, TRW, JTEKT, SHOWA, NSK, MANDO, etc., relying on their higher quality of products as well as the capital relations with foreign brand vehicle assembly plants, mainly support for foreign brand vehicles.

By contrast, local Chinese companies with relatively backward production process are occupied in the production of mechanical steering system, mainly supporting for homegrown brand vehicle assembly plants. With the technological improvement and experience accumulation, China Automotive Systems, Inc., Zhejiang Shibao Company Limited, Zhejiang Wanda Steering Gear Co., Ltd., AVIC-Xinhang Yubei Steering System Co., Ltd. and other local enterprises have seen fast development and started to provide product supporting services to joint-venture vehicle assembly plants.

China Automotive Steering System Demand Structure, 2011-2015E



Source: ResearchInChina *China Automotive Steering System Industry Report, 2012-2015*

Among joint ventures, JTEKT CORPORATION occupies the largest share in China steering system industry, provided with a total of seven steering system production bases there, four of which are dedicated to the production of electric power steering system. JTEKT Steering System (Xiamen) Co., Ltd. as one of major steering system production bases is engaged in the production of electric power steering gear, with annual capacity up to 1.2 million units, well above its industry counterparts. It mainly supports for Japanese vehicle assembly plants such as Tianjin FAW Toyota Motor Co., Ltd., Zhengzhou Nissan Automobile Co., Ltd., Dongfeng Nissan and GAC Toyota.

Among local enterprises, China Automotive Systems, Inc. enjoys the largest production capacity. Through production and operation by its eight subsidiaries, the company reaches total capacity of 3.25 million units, mainly supporting for FAW Group Corporation, Dongfeng Motor Corporation, Shenyang Brilliance Jinbei Automobile Co., Ltd., Chery Automobile Co., Ltd., Geely Automobile Holdings Limited, etc.. To retain its competitive edge in the industry, China Automotive Systems applies electronic chip to the power steering system and has conducted technical cooperation with BISHOP, KDAC, Korea’s Namyang and other companies for the development of EPS and EHPS. Development target of the company is to achieve annual capacity of 6.35 million units at the end of 2015.

China Automotive Steering System Industry Report, 2012-2015 of ResearchInChina mainly covers the followings:

1.Development, market demand, competition pattern, imports and exports, development trends, etc. of Chinese automotive system industry;

2.Development, market demand, production capacity, development trends, etc. of China EPS and HPS industries;

3.Chinese car support for EPS, HPS, EHPS;

4.Output, sales volume and matching models of China’s leading automotive steering system components manufacturers;

5.Development situation, production capacity, project construction, development planning, etc. of leading international and domestic steering system manufacturers.

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