



Global and China Automotive Safety System Industry Report, 2012-2013

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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

Global and China Automotive Safety System Industry Report, 2012-

2013 covers the followings:

1. Automotive Safety System Introduction
2. Automotive Safety System Market
3. Research on Automotive Safety System Industry
4. Research on 14 Automotive Safety System Manufacturers

The poor performance of both EU and Chinese auto markets in 2012 dragged down the growth rate of global automotive industry. Automotive safety system market size in that year was approximately \$22.365 billion, a slight increase of 1.2% over 2011. In 2013, automobile markets of China and the United States have done a superb job, thus offsetting the worse performance of the EU market, it is expected that the automotive safety system market in 2013 shows 3.3% growth. Meanwhile, as a large number of active automotive safety system products have come into use, the market size will be expanded to \$25.628 billion in 2015.

Currently, active automotive safety system mainly refers to the night vision system, which has been added to the top BMW products as early as 2005. For now, the night vision system is moving from luxury cars to mid-range car market. Major Manufacturers include Autoliv, Visteon, Hella, Astyx and Tyco Electronics.

Global automotive safety system industry saw no big change in 2012, the only big event was the massive recall of cars equipped with Takata airbags. Toyota, Honda, Nissan and Mazda announced the recall of 3.4 million cars worldwide due to the airbag issue; BMW Group also announced the global recall of 220,000 vehicles because of similar problems. The chief culprit was the airbag supplied by Takata, which therefore paid the cost of 30 billion yen, equivalent to its two-year operating income. However, this recall hasn't caused a severe blow to Takata, and customers haven't cancelled orders. In the second quarter of 2013, Takata reached revenue of 130.3 billion yen (up 27% YoY), and operating income of 6.245 billion yen (up 49.2% YoY).

Local manufacturers in China showed poor results. For instance, East Joy Long in 2012 witnessed declines of about 28% in revenue and more than 60% in net income, compared to 2011.

Revenue of the World's Major Automotive Safety System Manufacturers, 2009-2013(Unit: US\$M)

(Unit: US\$M)	2009	2010	2011	2012	2013E
Autoliv	5,121	7,171	8,232	8,267	8,566
Takata	3,774	4,456	4,787	5,008	5,080
TRW	2,904	3,557	3,752	3,519	3,530
Toyoda Gosei	1,547	1,630	1,821	1,987	2,008
Tokai Rika	868	789	794	838	920
KSS	1,008	1,120	1,280	1,160	1,220
Mobis	408	472	588	628	680
Nihon Plast	398	580	607	680	718

Source: **researchinchina** Global and China Automotive Safety System Industry Report, 2012-2013

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- 1.5 Active Safety Belt

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