



Global and China Automotive Electronic Industry Chain Report, 2013-2017

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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

Automotive electronic industry emerges after electronic information technology gets applied to the cars. From the perspective of application, automotive electronics can be divided into engine/transmission system, chassis system, body system, communication system, safety system and so forth.

This report covers airbags, tire pressure monitoring, ADAS, IVI (navigation and audio), automatic transmission, fuel injection, lighting and telematics. Meanwhile, it studies status quo, market trends, competition patterns and supply relationship of the industry, as well as analyzes financial data, operation and development strategies of major Chinese and foreign companies.

Tire Pressure Monitoring:

TPMS entered the Chinese market as the luxurious configuration of imported vehicle models. As Chinese consumers gradually put forward higher requirements on automotive safety, Chinese automobile manufacturers have applied TPMS as standard configuration; TPMS has been installed not only in luxury cars, but also in midrange cars.

In May 2014, 73 Chinese local passenger car brands set TPMS as standard configuration for 312 models and 1,567 styles. China's automotive TPMS OEM market size was estimated to reach 2.47 million sets in 2013, representing an increase of 32.8% over 2012. In recent years, Chinese TPMS market has been growing quickly owing to the small market size, a low comparison base and the optimistic attitudes of many TPMS vendors toward the popularity of TPMS in China.

Although China's TPMS standards have been approved, mandatory installation policies have not been issued yet. We forecast that China will introduce relevant policies around 2015, and the market will see rapid development then. It is conservatively estimated that Chinese TPMS market will present a CAGR of 27.8% during 2014-2017, the OEM market size will reach 6.61 million sets by 2017, and the aftermarket size will swell swiftly as well.

ADAS

Aided driving has been the fastest growing automotive technology over recent years, and it has entered the "Advanced Driver Assistance Systems (ADAS)" large-scale application stage. China's ADAS market size hit USD600 million in 2013, and will amount to USD2.7 billion in 2019, with the estimated CAGR of 29% during 2013-2017.

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In 2014, only about 6% of 6,079 vehicle models for sale in China are equipped with one or more sets of ADAS. Among these ADAS-contained models, imported cars account for 50%, and the ones made in China occupy the remaining 50%; however, over 80% of the ones made in China are produced by joint ventures, which means the ADAS configuration rate of domestic brands is much lower than that of international brands.

China sold 21.99 million automobiles in 2013, including 17.93 million passenger cars and 4.06 million commercial vehicles, with the ADAS preinstalled rate of about 2.5% and the overall assembly rate of 3% or so.

Fuel Injection

Automotive EFI System is divided into gasoline and diesel electronic injection system. Gasoline electronic injection system is more popular and major carmakers all have mastered the know-how of it. However, diesel electronic injection technology is monopolized by a few giants such as Delphi, Bosch and Denso.

The application proportion of Chinese heavy truck high-pressure common rail system was about 35% in 2013, and ascends quickly in 2014 as the enforcement time of National Emission Standards IV is definite. In-line pump devices complying with National Emission Standards III can not meet the requirements of National Emission Standards IV and V in terms of fuel pressure and injection control, so they need to be completely replaced by electric control high-pressure common rail injection system in the future. The application proportion of Chinese heavy truck diesel high-pressure common rail system will increase to 60% in 2015 and 80% in 2017.

According to estimates, Chinese diesel electric-control high-pressure common rail market size is expected to reach RMB6.846 billion in 2014 and RMB10.751 billion in 2017 with an AAGR of 16.23%.

A Panorama of Automotive Electronics Industry Chain



Source: Global and China Automotive Electronic Industry Chain Report, 2013-2017, by ResearchInChina

The report covers the following:

- ⇒ Chinese automobile and auto parts markets, including output, sales volume and market structure of passenger cars and commercial vehicles, and the competition pattern of auto parts market;
- ⇒ Global and Chinese automotive electronic market, embracing definition, classification, market size, development course and development trends.
- ⇒ Definition, classification, development course, industrial standards, policies & regulations, R & D route, market size, output, sales volume, supporting, market demand, competition pattern, import & export and development trends of major automotive electronic market segments, such as intelligent driving, ADAS, Telematics, IVI, navigation, audio, airbags, TPMS, automatic transmission, fuel injection and lighting.
- ⇒ Profile, business in China, financial situation, output, sales volume, major customers, main products, supporting, production bases, R & D, technology routes and segments of major global and Chinese auto parts companies, including Continental, Denso, Bosch, Delphi, Autoliv, TRW, Magneti Marelli, Aisin, Mobis, Valeo, Schrader, WABCO, Harman International, Pioneer, Clarion, ZF Friedrichshafen, Keihin, Hella, Koito, Hangsheng Electronics, Desay, Kysonix, Foryou, Topsystem Electronics, Coagent, Geely, Chery, China National Heavy Duty Truck and Weifu.
- ⇒ Profile, financial condition, major customers, main products, application fields, solutions, R & D and technology routes of major global and Chinese automotive electronic semiconductor companies, embracing Infineon, Freescale, Renesas, Texas Instruments and Mobileye.

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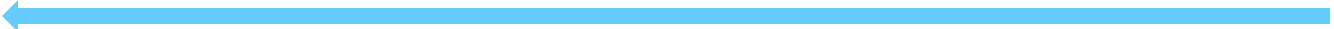
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