

Global and China Automotive Steering System Industry Report, 2014-2018

Feb. 2015

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.

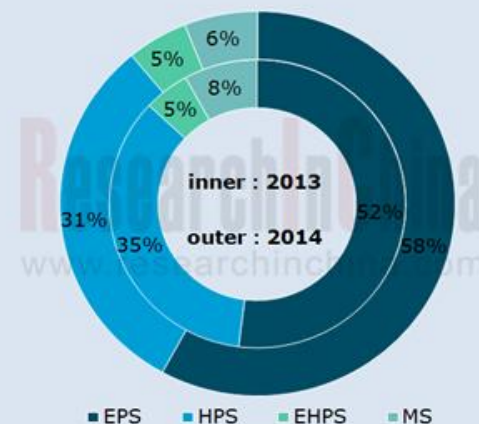
Abstract

With the expansion of the automotive market, the demand for steering system has showed steady growth. In 2014, the global automotive steering system market size exceeded 90 million sets with the revenue of USD31.1 billion. EPS has become the dominance of the steering system market, with a share of over 50%.

In 2014, Chinese automotive steering system market size increased to 23.89 million sets, of which the demand for passenger car steering system rose to 19.92 million sets. In China, the EPS technology of mainstream companies has been more mature, the product demand has been growing rapidly, and EPS is replacing HPS to be the main role in the automotive steering system market.

The global automotive steering system market is highly concentrated in six big producers – JTEKT, ZF Lenksysteme, TRW, NSK, Mando and Nexteer, in which JTEKT and ZF Lenksysteme act as leaders with the respective market share of more than 15%. In 2014, the 100% stake of the world's second largest steering system manufacturer – ZF Lenksysteme was taken over by Bosch, while ZF acquired the third-ranked TRW; the fifth largest producer Mando became an independent company focusing on EPS and other parts.

China's Passenger Car Steering System Market Structure, 2013-2014



Source: Global and China Automotive Steering System Industry Report, 2014-2018; ResearchInChina

In the Chinese market, JTEKT, ZF Lenksysteme and other foreign manufacturers still occupy dominating positions; at the same time, Chinese local enterprises such as CAAS, Zhejiang Shibao, FAWER Automotive Parts, AVIC-Xihang Yubei and ELITE represent huge potentials with higher market share.

As China's largest steering system group, CAAS operates its business through its eight subsidiaries. In 2013, CAAS sold up to 4.27 million sets of steering system, representing a year-on-year increase of 22% and the market share of 19.3%, 1.2 percentage points higher than 2012. In China, CAAS mainly serves Geely, Great Wall Motors, Brilliance Jinbei, BYD, Beiqi Foton, Dongfeng Motor, FAW Group and Chery.

ZF Shanghai Steering Systems is a joint venture set up by Huayu Automotive Systems (49%) and ZF Lenksysteme (51%), with more than 1,500 employees. In 2013, the company sold 2.64 million sets of steering system and held the market share of 11.9%, 3.1 percentage points higher than 2012. Wherein, the company sold 2.12 million sets of EPS with the market share of 23%. The company has established two branches in Yantai and Wuhan, serving customers in North and South China respectively. Wuhan Branch began production in October 2014 and supported Shanghai GM (Wuhan), FAW-Volkswagen Chengdu, Shanghai Volkswagen Changsha, Dongfeng Peugeot Citroen, Changan Ford and other customers.

The report includes the following aspects:

- Global and Chinese automotive steering system market size, market structure and competitive landscape; relationship between leading manufacturers and suppliers;
- Global and Chinese electric steering system (EPS) and hydraulic steering system (HPS) market size, market structure and supply;
- Financial status, product types, capacity building, output and sales volume of major steering system companies in the world and China.

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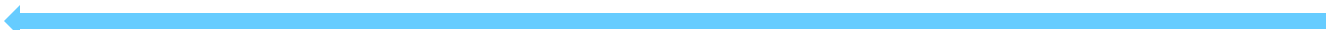
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