Global and China Automotive Seating Industry Report, 2014-2015

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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.

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Abstract

The report highlights the following:
1, Global automotive market and industry
2, Chinese automotive market and industry
3, Global automotive seating market and industry
4, Chinese automotive seating market and industry
5, Brief introduction to automotive seating
6, 15 automotive seating manufacturers

The seemingly simple automotive seating actually reflects a country's machining ability. In the world, at most 20 companies are capable of producing automotive seating whose frames are made of precision metals via stamping, while nearly a thousand companies have the capability to produce automotive engines.

In 2010, the global light vehicle output amounted to about 74.8 million; averagely, the automotive seating of a light vehicle was tagged with the selling price of approximately USD742, so the global light vehicle seating market valued USD53.8 billion. In 2014, the average selling price was USD786, a slight increase over USD771 in 2013; the global market was worth USD66.8 billion. In 2015, the average selling price is expected to reach USD800 and the overall market size will grow 30.3% from 2010 to USD70.1 billion.

Global automotive seating manufacturers can be divided into three camps, namely North America, Japan and Europe that held about 50%, about 30% and 13% market share in 2014 respectively. Compared with 36% in 2010, the market share of Japanese manufacturers in 2014 was lower because of the depreciation of the yen instead of their weakened competitiveness.

Mergers and acquisitions occur frequently in the seating field. Large manufacturers are keen on taking over seating parts producers to improve the supply chain. Recently, Lear has acquired the world's largest manufacturer of automotive leather seating -- Eagle Ottawa for USD850 million. In 2012, Lear spent USD257 million on purchasing Guilford Mills which is an automotive seating fabric manufacturer. By virtue of mergers and acquisitions, Lear has become the most promising player in the seating market, and saw its revenue surge 10.8% in 2014. By contrast, Magna suffers consecutive decline, and supposes seating business as a burden; therefore, it has to either sell the business or acquire small factories to enhance competitiveness.

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Johnson Controls Inc. (hereinafter referred to as JCI), as the world's largest automotive seating manufacturer, firmly grasps the Chinese market, from which JCI reaped the revenue of USD6.1 billion in 2014 being the largest origin of its proceeds. JCI boasts 61 production bases in 30 cities throughout China with nearly 28,000 employees, serving all of car makers. 42 ones of these bases are joint ventures in which JCI enjoys the absolute right to speak, while JCI's Chinese partners only play the role of financial investors. JCI seizes 53% market share in China.

European manufacturers are a great deal interested in the Chinese market as well. Faurecia plans to build seven new plants in China in the next three years, including six joint ventures and a sole proprietorship. Besides, Brose intends to raise the capacity of its Shanghai Plant; and Lear makes more investments in China. However, Japanese companies almost have no new investment plan due to the tension of Sino-Japanese ties.

Ranking of Major Automotive Seating Manufacturers Worldwide by Revenue, 2010-2014

USD mln	2010	2011	2012	2013	2014
Toyota Boshkou	9,893	10,763	11,276	11,920	11,500
TS	3,439	3,231	3,839	4,120	3,980
TACHI-S	2,493	2,551	2,687	2,150	2,360
Faurecia	5,758	6,440	6,762	7,046	7,008
Lear	9,395	10,943	11,030	12,018	13,310
JC	13,114	16,052	16,688	16,285	17,531
Magna	2,008	2,558	2,956	2,510	2,310
Brose	1,218	1,418	1,588	1,584	1,980
Dymos	1,163	1,219	1,250	1,380	1,500
NHK Spring	2,073	2,196	2,412	2,450	2,510
Others	3,184	2,431	2,371	2,610	2,820

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