



Global and China Automotive Safety System Industry Report, 2014-2015

Sep. 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

Global and China Automotive Safety System Industry Report, 2014-2015 covers the followings

1. Analysis on global automobile market and industry;
2. Analysis on Chinese automobile market and industry;
3. Analysis on Global and Chinese automotive safety system industry;
4. Analysis on Global and Chinese automotive safety system market;
5. Research on 14 typical automotive safety system companies.

The global automotive safety system market size hit USD27 billion in 2015, up 4.1% from a year ago; and it is expected to grow 3.7% to USD28 billion in 2016. One reason for decelerated growth lies mainly in obvious deflation, and the falling prices of industrial raw materials also caused a drop in the prices of finished products; the other reason is that China as the world's largest automarket sees sharp slide, bound to be flat in 2015. The situation is expected to turn better by 2017 when global automotive safety system market is worth USD29.4 billion, an increase of 5.1%.

Entering the second half of 2015, the Chinese automotive market witnesses substantial decline; the U.S. market growth is slowing; the South American market is even worse; while Europe is the only one doing fairly well.

Regarding automotive safety system industry, FountainVest Partners in China has been interested in purchasing KSS since the second half of 2014. However, as Chinese stocks crash into a bear market, there is almost no possibility of an acquisition.

For TRW, automotive safety system is not its core product any more after ZF's acquisition, and probably spun off into an independent company by ZF. Takada airbag recalls since 2014 have exerted little effect on automotive safety system industry: outsiders thought that automakers would cut the procurement of Takada airbags, but there is no reduction in reality; both overall revenue and profit of Takada are growing steadily. Moreover, the severe depreciation of the Japanese Yen makes Takada more competitive in products, so as the only large automotive safety system vendor that sees revenue rising.

Ranking of Major Global Automotive Safety System Vendors by Revenue, 2009-2015

(USD mln)

	2009	2010	2011	2012	2013	2014	2015
Autoliv	5,121	7,171	8,232	8,267	8,803	9,241	8,818
Takata	3,774	4,456	4,787	5,008	5,608	5,850	6,020
TRW	2,904	3,557	3,752	3,519	3,724	3,893	3,810
Toyota Gosei	1,547	1,630	1,721	1,987	2,018	1,890	1,860
Tokai Rika	868	789	794	838	890	717	760
KSS	1,008	1,120	1,280	1,020	1,120	1,190	1,260
Mobis	408	472	588	628	712	760	780
NihonPlast	398	580	607	680	713	630	650

1 Introduction to Automotive Safety System

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 - 4.1.5 Autoliv (China) Steering Wheel Co., Ltd
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