

**Global and China Automobile Brake
System (Disc Brake, Drum Brake, ABS,
EBD/CBC, EBA/BAS/BA/AEB,
ESC/ESP/DSC, AUTO HOLD) Industry
Report, 2016-2020**

Jun. 2016

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

In 2015, the global market size of automotive braking system exceeded USD50 billion, and that of China's automotive braking system came to over RMB60 billion. With the saturation of automobile market, the global and Chinese automotive braking system markets have leveled off. It is expected during 2016-2020 that the global and Chinese automotive braking system markets will grow at an average annual rate of 4.4% and 7.3%, respectively. And electronic control system may become the main driving force behind the industry development.

In China's braking system market, manufacturers mainly develop towards ABS, braking force distribution (EBD/CBC, etc.), brake assist (EBA/BAS/BA), Vehicle Stability Control (ESC/ESP, DSC, etc.), AUTO HOLD, and so forth. Among them, ABS and EBD/CBC have the highest assembly rate of close to 90%; vehicle stability control develops very fast, with the assembly rate approaching 50%; brake assist and AUTO HOLD, benefiting from the development of autonomous driving technology, are seeing rapid growth in assembly rate.

At present, the Chinese braking system manufacturers are working to make layout in electronic control, particularly in ABS, Vehicle Stability Control (ESC/ESP/DSC), and Electric Park Brake (EPB). The advanced enterprises, such as Zhejiang Asia-Pacific Mechanical & Electronic and Zhejiang Vie Science & Technology, have entered the fields of intelligent drive and telematics.

Zhejiang Asia-Pacific Mechanical & Electronic, one of the leading Chinese braking system manufacturers, mainly operates an array of products including disc brakes, drum brakes, brake pumps, vacuum boosters, and ABS, etc. It now has an annual capacity of 1 million sets of automotive electronic control system. At present, the company is actively developing automotive electronics, and, based on ABS, gradually makes technological breakthroughs in EPB, ESC, and EABS. Currently, the company is entitled to supply ABS and EPB to auto makers like Chery, SAIC, and FAW, and is expected to achieve small-lot supply in 2016. Additionally, it has obtained eligibility for supplying ESC and EABS to Dongfeng Motor and Nissan.

Zhejiang Vie Science & Technology is also an important braking system manufacturer in China. In 2015, the company realized massive supply of its independently developed and industrialized ABS, and completed the EBS development and vehicle matching test. Meanwhile, it was developing ESC and EPB, etc. In February 2016, the company planned to invest RMB267 million in automotive EBS project. When the design capacity is achieved, the company will have a capacity of 200,000 sets/a ABS and 50,000 sets/a EBS, with the revenue and net income estimated to add annually RMB426 million and RMB66.82 million, respectively.

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Layout of Major Chinese Braking System Manufacturers in Electronic Control

Company	ABS	Braking Force Distribution (EBD/CBC)	Brake Assist (EBA/BAS/BA/AEB)	Vehicle Stability Control (ESC/ESP/DSC)	Electric Park Brake (EPB)	Other
Dongfeng Electronic Technology	√					
Guangzhou Comet	√	√		√		Eddy current retarder, Electronic Braking System (EBS), and CMS
FAWER Automotive Parts	√					
Wangxiang Qianchao	√			√	√	
Ruili Group	√					Eddy Current Retarder
Zhejiang Asia-Pacific Mechanical & Electronic	√			√	√	EABS, and intelligent vehicles
Zhejiang Vie Science & Technology				√	√	Electronic Braking Systems (EBS), ADAS, and hub motor, etc.
Wuhu Bethel Automotive Safety Systems	√			√	√	
Longji Machinery						

Source: ResearchInChina

The report highlights the following:

- Market size and competitive landscape of global automotive braking system;
- Market size, import and export, competitive landscape, development trend of automotive braking system in China;
- Development of China's brake market segments, including disc brakes, drum brakes, pneumatic brakes, and hydraulic brakes;
- Assembly rate, market size, and development of China's electronic control market (ABS, EBD/CBC, EBA/BAS/BA/AEB, ESC/ESP/DSC, and AUTO HOLD);
- Development of global and China braking system suppliers, including product type, financial indicators, capacity, output and sales volume, production bases, industrial layout, and development trend, etc.

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