



Global and China Tire Pressure Monitoring System (TPMS) Industry Report, 2016-2020

Dec. 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

Tire pressure monitoring system (TPMS) as a kind of active safety in advance has been recognized and valued in many countries in recent years. Currently, the United States, the European Union, South Korea and Taiwan (China) have introduced TPMS mandatory standards and compulsorily required installation; Iran, Russia, China, Japan, India, Malaysia, the Philippines and Indonesia are also advancing the introduction and implementation of TPMS mandatory standards.

Global TPMS OEM market size has been more than 40 million sets by the end of 2015, of which, the European Union has the largest market share of 38.7%, followed by the United States with 28.4%. In the future, with mandatory installation of TPMS in more countries and regions as well as steady growth of automobile market, global TPMS industry will usher in rapid development. It is predicted that by 2020, global TPMS OEM market size will increase by approximately 80% from 2015.

China is the world's largest automobile market, with TPMS mandatory standards approved by the technical review in September 2016 and expected to be released in the first half of 2017. In addition, the time for mandatory installation of TPMS in M1 vehicles has been basically determined, i.e. mandatory installation of TPMS in all newly-authorized cars from January 1, 2019 and in all in-production cars from January 1, 2020. Since the enforcement of TPMS mandatory standards in 2019, China will see new demand for nearly 20 million sets of TPMS a year; by 2020, China will surpass Europe and the United States and become the world's largest TPMS market.

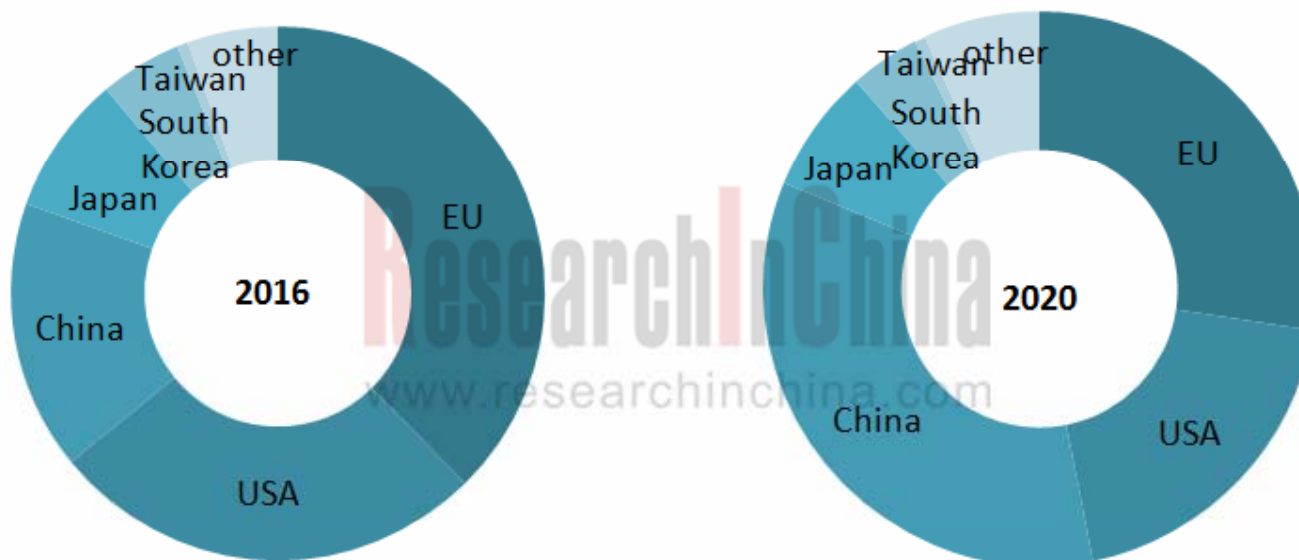
Global TPMS market is controlled by Schrader, Continental, Pacific, TRW, and HUF, which accounted for a combined 90% of market share in 2015. TPMS chip market is monopolized by GE, Infineon, and NXP. Guangdong Hiway Integrated Circuit Technology Co., Ltd. as China's first TPMS chip manufacturer independently produced the global minimum, the domestic first TPMS chip in 2016.

Foreign investment has accounted for a big share of the Chinese TPMS OEM and aftermarket; the world's top five companies have entered China and occupied the high-end market. Chinese OEM suppliers with experience in bulk supply include Shanghai Baolong Automotive Corporation, Shanghai Hangsheng Industry Co., Ltd., Sate Auto Electronic Co., Ltd., etc.

The report highlights the following:

- Global TPMS laws & regulations, development history, market size, enterprise and product competition pattern, as well as development status of TPMS in major countries and regions;
- Technological development, laws & regulations, development history, market coverage, market size and structure, enterprise competition pattern, run flat tire market of TPMS in China;
- Operation, TPMS supply relationship, development-in-China, etc. of 9 global TPMS companies;
- Operation, TPMS business, etc. of 23 Mainland Chinese companies and 6 Taiwanese companies;
- Operation, TPMS scheme, development-in-China, etc. of 5 global TPMS chip suppliers.

Global TPMS OEM Market Structure by Region, 2016&2020



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