



**Global and China Automotive Seat Motor  
Industry Report, 2016-2020**

**Jan.2017**

## **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

An automotive seat motor is a power source for adjusting seat positions, including to-and-fro movement, up-and-down movement, reclining (backrest) angle adjustment and the electric adjustment regarding thigh support, waist support, headrest position and so forth.

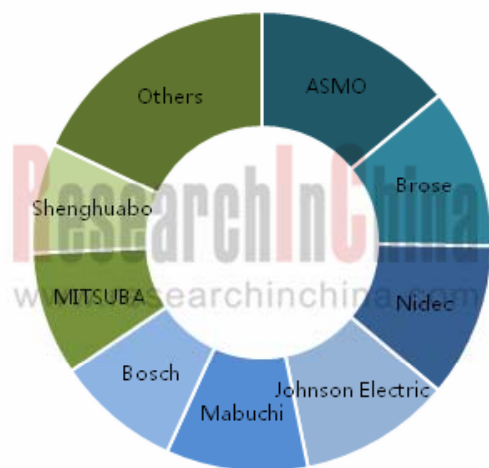
More than 95% of power seats are equipped in passenger cars. The higher the prices of passenger cars are, the higher the installation rate of power seats is, the more seat positions can be adjusted, and the more motors are needed. At present, over 75% of sold cars are Class A (compact) vehicles whose power seat installation rate is lower than Class B (midsize) vehicles (over 75%), Class C (executive) vehicles (above 90%) and Class D (deluxe) vehicles (nearly 100%). Therefore, the potential demand for automotive seat motors is enormous.

In 2015, the global automotive seat motor shipment exceeded 100 million sets, with the CAGR estimated to be 5.5% from 2016 to 2020. As a global major automobile producer and seller, China shipped 24 million automotive seat motors in 2015, enjoying the global share of over 20.0%; during 2016-2020, its shipment CAGR is forecasted at about 9.5%. China's seat motor market grows more swiftly than the global market mainly thanks to the fast-growing passenger car sales in the country where the market demand is gearing towards medium and high-end products, which stimulates the demand for seat motors vigorously.

The global automotive seat motor market is relatively stable, wherein Japanese vendors have always played a leading role. In 2015, four of the world's eight largest seat motor manufacturers came from Japan (ASMO, Nidec, Mitsuba and Mabuchi) with the combined market share of over 40%. In addition, Germany's Bosch and Brose, China's Johnson Electric and Shenghuabo Group are the world's leading seat motor suppliers as well.

Being bullish about Chinese automotive seat motor market, ASMO, Brose and other foreign peers have stepped up their layout in China by building factories, expanding capacity, etc..

## Competitive Landscape of Global Automotive Seat Motor Market, 2015



Source: ResearchInChina

In May 2016, the completed "Capacity Expansion Project of Tianjin ASMO Automotive Small Motor Co., Ltd" raising the seat motor capacity from 1 million sets/a to 3 million sets/a passed EIA.

In December 2016, Brose set up a new factory in Taicang, Jiangsu, mainly serving Geely, Volvo and other clients with window regulators, seat rails and seat motors. The production is planned to commence in 2018.

Amid the global advocacy of energy saving and environmental protection, automobiles will tend to be lightweight. To meet market demand, the weight of automotive seats will be further reduced, so manufacturers should further develop higher-power and lighter compact seat motors.

The report focuses on the following:

Definition, classification, technical standards and the like of automotive seat motor;

Status quo, market size, competitive landscape, development trend, etc. of the global and Chinese seat motors;

Market size, market structure, competitive landscape, etc. of downstream automobiles and automotive seats;

Operation and automotive seat motor business of 8 Chinese and 6 foreign automotive seat motor companies.

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