

The Vertical Portal for China Business Intelligence

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 costeffective 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

In 2016, the automotive steering system industry at home and abroad was characterized by:

1. Steady growth in demand

Global automotive steering system market benefits enormously from a steady growth in auto sales with the demand increasing by 4.7% year on year to 93.86 million sets in 2016. China's demand reached 28.12 million sets in 2016, including 24.42 million sets of steering system for passenger cars, and is expected to total 38.05 million sets in 2021.

2. High market concentration and fierce competition

Global automotive steering system market is primarily occupied by multinational companies including JTEKT, BOSCH, TRW, NSK, Mando, and Nexteer. In 2016, JTEKT and BOSCH together seized more than one-third (35.4%) share of the whole market. Meanwhile, foreign brand giants, by virtue of technical advantages of products and their capital relations with foreign brand carmakers, dominate the Chinese automotive steering system market. Local Chinese enterprises represented by CAAS and Zhejiang Shibao claim a relatively small market share. They are enhancing competitive strength by making more efforts to develop new products.

3. EPS: a mainstream one promoted by more popular NEVs

EPS has become a mainstream automotive steering system, capturing 54.7% of global demand for steering system in 2016. The assembly rate of EPS in China has also reached 53%.

According to the Technology Roadmap for Energy Saving and New Energy Vehicles issued by the Society of Automotive Engineers of China, energy-efficient vehicles are expected to hold a 50% market share by 2030. Driven by rapid growth of new energy vehicles, the sales and penetration of EPS as a standard configuration, hopefully, increase substantially.

The report focuses on the following:

Global and Chinese automotive steering system markets (status quo, market size, competitive landscape, supply relation, imports & exports, prospects, etc.);

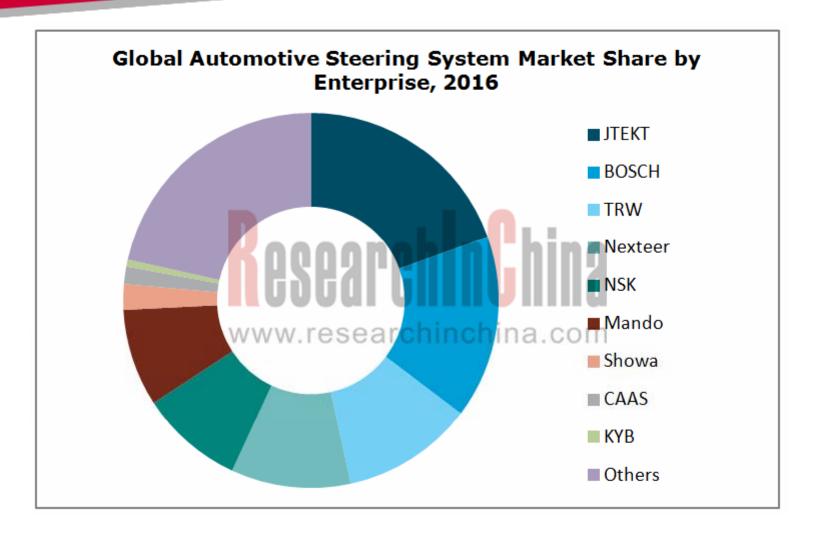
Global and Chinese EPS markets (status quo, market size, competitive landscape, trends, summary & forecast, etc.);

Global and Chinese hydraulic steering system markets;

8 foreign and 13 domestic automotive steering system producers, including their operation, major customers, R&D investment, output & sales, etc.

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