China Automotive Anti-lock Braking System (ABS) Industry Report, 2017-2021

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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.

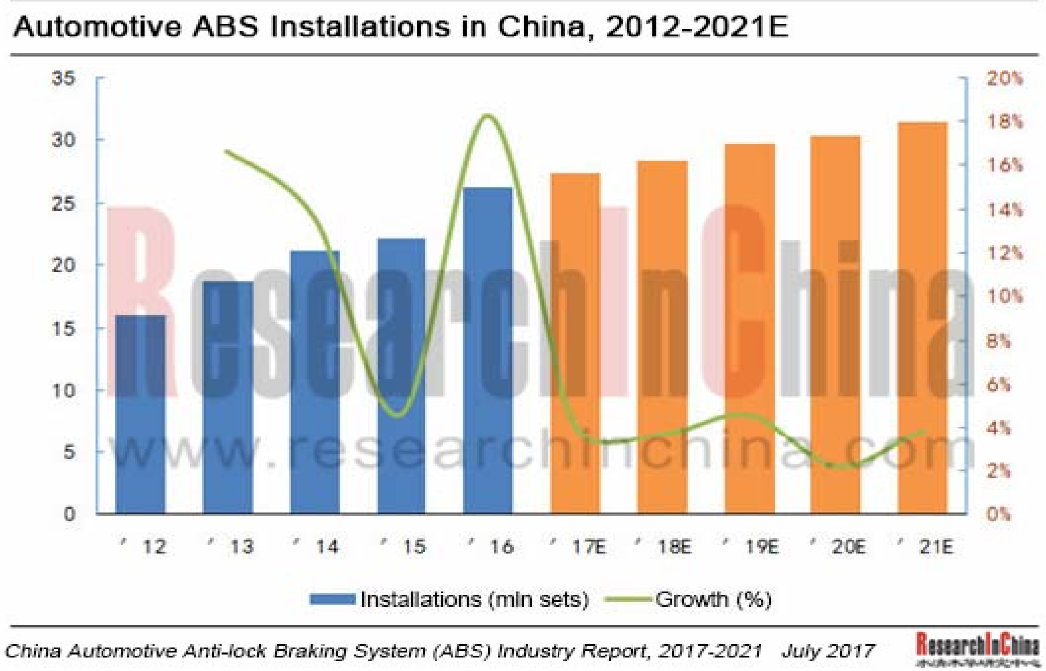
Abstract

With the continuous development of the automobile industry in China, people have higher requirements on driving safety, thus fueling the demand for automotive anti-lock braking system (ABS). In addition, hydraulic ABS has virtually spread from mid-to high-end passenger cars to low-end models and the introduction of "Safety Specifications for Power-driven Vehicles Operating on Roads" (GB7258) and other relevant documents have boosted the installation rate of ABS in commercial vehicle field in recent years. 24.03 million sets of automotive ABS were installed in China in 2016, up by 18.3% from a year ago and driven by both policy incentives and a year-on-year 14.5% growth in auto sales. As the country's auto production rose by only 4.6% in the first half of 2017, ABS growth also slowed correspondingly. China's demand for ABS is expected to hit 30.68 million sets in 2021 at a CAGR of 5.0%.

Product segments: the ABS on passenger cars and small commercial vehicles are largely hydraulic ones and the ABS on large and medium-sized commercial vehicles pneumatic ones. As the output and sales volume of passenger cars obviously exceed that of commercial vehicles, combined with passenger car makers' and consumers' greater emphasis on safety system, the installation rate of ABS in passenger cars is far higher than that in commercial vehicles. In 2016, 22.58 million sets of ABS were installed in passenger cars, representing an installation rate of 92.5%. As the standard GB7258 is implemented in a stricter manner, the installation rate of ABS in commercial vehicles is predicted to rise significantly over the next couple of years.

Competitive landscape: like other automotive parts, the automotive ABS market is more stable. Passenger car ABS market is practically monopolized by foreign brands. Continental-invested Shanghai Automotive Brake Systems Co., Ltd. (SABS) started local production of ABS in 1997 and BOSCH, MANDO and NISSIN began entering the Chinese market from 2004 to serve JV brands and some homegrown brands. Chinese enterprises (like Wanxiang Qianchao and Zhejiang Asia-pacific Mechanical & Electronic) have made remarkable headway in recent years but are still weak as a whole, lagging behind foreign counterparts in terms of product quality and technology. They serve mainly homegrown car brands whose sales rise in recent years and which have helped local ABS suppliers achieve exceptional performance. About half of commercial vehicle ABS market is occupied by WABCO, while emerging Chinese players like Kormee, VIE, and JuNeng will, hopefully, further raise their market share.

China Anti-lock Braking System (ABS) Industry Report, 2017-2021 focuses on the following:
Automotive ABS industry in China (definition and classification, development trends, etc.);
Automobile industry and ABS industry in China (auto output, sales, and ownership, ABS installations, supporting relationship, etc.);
Chinese automotive ABS market segments (hydraulic ABS and pneumatic ABS (market size, competitive landscape, development trends, etc.));
Nine international players (Bosch, Continental, ZF, ADVICS, Mando, Nissin Kogyo, Hyundai Mobis, WABCO, KNORR) and nine Chinese peers (Zhejiang Asia-pacific Mechanical & Electronic, HUAYU Automotive Systems, Zhejiang Vie Science & Technology, Wuhu Bethel Automotive Safety Systems, Wanxiang Qianchao, Fawer Automotive Parts, Guangzhou Ruili Kormee Automotive Electronic, Chongqing JUNENG, and Dongfeng Electronic Technology) (profile, financials, main products, R&D, distribution of production bases, technical characteristics, etc.)



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