



**Global and China Automotive Seating
Industry Report, 2017-2021**

Dec. 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

Automotive seat is a seating facility for passengers to sit, with complete decorations. As a key functional part which plays an important role in overall automotive safety technology, it directly impacts safety, comfort and appearance of automobile. Manufacture of core parts of seat has high requirements on accuracy and strength and it is difficult to build them, seating industry is actually a capital-intensive and technology-intensive business.

Global automotive seating market saw an ASP of roughly USD804 in 2016 with a market size of USD73.6 billion, a figure projected to climb to USD75.9 billion in 2017 and further jump to USD92.5 billion in 2021 as auto market grows steadily.

Global automotive seating market has a high concentration due to technology accuracy and manufacturing difficulties, with over 90% share seized by top10 seat manufacturers including Adient, Lear, Toyota Boshoku and Faurecia, of which Adient and Lear perch at the first and second place in the world, with a combined share of 43% in global market in 2016.

As auto market developed rapidly, especially new energy vehicle, manufacturers successively expanded capacity through extension or acquisition, aiming at faster global layout and stronger competitive strength. For example, Adient bought seat maker Futuris, and Japanese seat companies like Toyota Boshoku and TACHI co-funded business; Lear set up joint ventures with TACHI-S and NHK Spring, purchased AccuMED Holdings Corp., a special fabrics company in late 2016 and also automotive seat manufacturer Grupo Antolin at the beginning of 2017.

China is the biggest consumer of automotive seating in the world, but its market is dominated by foreign brands like Adient, Lear, Faurecia, Toyota Boshoku and TS. Targeting medium- and high-end markets, these foreign players make layout in China by setting up joint factories with local companies, while Chinese automotive seating brands only concentrate on low-end market due to a technology gap with joint ventures or overseas peers.

In China, automakers co-built by Chinese companies with European, American, Japanese and Korean auto manufacturers, use seats from foreign or joint factories; majority of Chinese auto brands also choose joint ventures as their suppliers; Great Wall, BYD, Chery and Geely adopts a combination model of local manufacturers and joint venture brands. In October 2017, BYD branched out its seating business and founded a new company with Faurecia in Shenzhen. It will use seats produced by the new factory in the future.

Global Acquisitions Made by Major Seat Makers, 2017

Enterprise	Time	Event
Lear	Dec 2016	Acquired AccuMED, a specialty fabric manufacturer with the aim of obtaining innovative processing technology for automotive fabric and enhancing competitiveness in other fabrics
Lear	Feb 2017	Signed a definitive agreement to acquire Grupo Antolin's automotive seating business for €286 million. The closing of the transaction is expected to occur in the first half of 2017.
Ningbo Jifeng Auto Parts	Feb 2017	Bought a 9.2% stake in Germany's parts supplier Grammer for €60 million. The two sides built strategic partnership in order to increase chance of penetrating into local and international OEMs.
TACHI-S	Apr 2017	Acquired TF-Metal
Faurecia	Jul 2017	Set up a joint venture with Liuzhou Wuling Automobile Industry Co., Ltd., named Faurecia Liuzhou Automotive Seating Co. Ltd. with a registered capital of RMB150 million.
Adient	Aug 2017	Signed a definitive agreement to acquire Futuris Group for USD360 million. Futuris is a global designer and manufacturer of fully integrated automotive seating and interior systems
Faurecia	Oct 2017	Established a joint venture with BYD, named Shenzhen Faurecia Automotive Parts Co., Ltd. (70% Faurecia – 30% BYD) aiming to develop and manufacture advanced seating solutions for BYD-affiliated OEM brands. The strategic partnership will bring together BYD's seating production activities in Shenzhen, Xi'an and Changsha.
Faurecia	Nov 2017	Finalized the acquisition of a majority stake in Jiangxi Coagent Electronics., Ltd. Renamed Faurecia Coagent Electronics S&T Co., Ltd., the new company will be dedicated to develop integrated and innovative in-vehicle infotainment solution.

Source: Global and China Automotive Seating Industry Report, 2017-2021

In the coming years, foreign seating brands and joint ventures will grab a larger market share as upgrading of consumer demand requires improvement of intelligence and comfort technologies; Chinese seating makers will firmly evolve into joint ventures for supporting upgrade and edge into the supply chains of mainstream automakers, through technological breakthroughs.

Global and China Automotive Seating Industry Report, 2017-2021 highlights the following:

- ◆ Composition and function of automotive seating;
- ◆ Global automotive seating industry (market size, competition pattern of companies, seating supply relationship of main automakers, development trend, etc.);
- ◆ China automotive seating industry (market size, competition pattern of companies, seating supply relationship of main automakers, development trend, etc.);
- ◆ Global and Chinese automotive seating manufacturers (operation, seating business, development trend, etc.).

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