



Global and China Tire Pressure Monitoring System (TPMS) Industry Report, 2017-2021

Jan. 2018

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

As people have become more aware of driving safety and countries like the United States, EU, South Korea and China (Taiwan, Mainland) introduced mandatory standards on TPMS in recent years, global TPMS market, primarily OEM, has grown steadily. Global TPMS OEM market size was about 47.62 million sets with an installation rate of 50.1% in 2016. The figures for 2021 are expected to reach 81.27 million sets and 77.4%.

As mandatory European laws and regulations are implemented, Europe has surpassed the United States as the region with the largest demand worldwide, while China becomes the world's third largest TPMS market after Europe and the United States by virtue of its enormous automobile market. The three regions seize a market share of 37.1%, 25.4% and 16.1%, respectively.

According to the requirements of China's mandatory TPMS standard, for M1 auto models, all new certified vehicle must carry TPMS in the Chinese market by 2019 and all vehicles being produced must be compulsorily installed with TPMS in 2020, therefore China will overtake Europe to be the world's largest TPMS market by 2020. Despite a late starter, China has seen gradual increase in the penetration of TPMS and substantial growth in TPMS market for consumers are more demanding on car safety performance. The installation rate of TPMS was about 27.3% and the TPMS OEM market 7.68 million sets or so in 2016.

Theoretical demand was 24.42 million sets in the Chinese TPMS OEM market in 2016 based on the country's output of 24.42 million passenger cars, indicating a huge gap but also broad prospects for development. Propelled by the country's mandatory TPMS standard, the installation rate in the Chinese TPMS OEM market will grow rapidly over the next couple of years, hitting an estimated 74.2% in 2021 on a market size of 23.22 million sets in 2021.

Global TPMS OEM market now is primarily dominated by Schrader, Continental, Pacific, ZF TRW and HUF, the five players holding a combined global market share of nearly 90% by virtue of technological superiority. Schrader, an undisputed bellwether, took an about 54.8% market share worldwide in 2017.

Although there are more than 100 local TPMS enterprises in China, only a dozen ones including Topsystm, Sate Auto Electronic, Shanghai Baolong Automotive and Hamaton Automotive Technology are capable of bulk supply.

TPMS Capacity of Major Chinese Enterprises by the End of 2016

Enterprise	TPMS Capacity	Note
Topsystem	8 mln sets	--
Sate Auto Electronic	2.5 mln sets	--
Shanghai Automotive Baolong	> 1 mln sets	5 mln pcs/a TPMS emitter and 1 mln pcs/a TPMS controller; addition of 20 mln pcs/a TPMS emitter and 2.5 mln pcs/a TPMS controller after operation of the project with raised funds
Hamaton Automotive Technology	1 mln sets	The 1 mln sets/a TPMS suit project with the raised funds under construction
Shenzhen Auotch	>300,000 sets	--
Nanjing Top Sun Technology	300,000 sets	--
Steelmate	> 150,000 sets	--
Victon	100,000 sets	--
Kysonix	100,000 sets	--

Source: ResearchInChina

For now, the TPMS on JV-branded cars is supplied by multi-national companies represented by Schrader, while local Chinese players gain an upper hand in supply of TPMS on homegrown car brands. However, as Chinese enterprises continue to improve their technologies, the typical company Shanghai Baolong Automotive and some other peers have begun providing TPMS for JV auto brands.

Global and China Tire Pressure Monitoring System (TPMS) Industry Report, 2017-2021 highlights the followings:

- ◆ Global TPMS industry (development environment, status quo, market size/structure, competitive landscape, development in major countries/regions);
- ◆ TPMS industry in China (development environment, status quo of technology/development, market demand, market penetration, market structure, competitive landscape, summary);
- ◆ 8 foreign, 25 Chinese mainland, 6 Taiwanese TPMS vendors and 5 TPMS sensor chip companies.

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