



# **Global and China Automotive Seat Motor Industry Report, 2018-2022**

**June 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

The growing demand for automobiles has driven the steady growth of the automotive seat industry whose market size reached approximately USD75.9 billion worldwide in 2017 with a year-on-year increase of 3.1%. China, the world's largest car producer, saw the automotive seat market size of RMB123.1 billion (about USD18.2 billion as per the average exchange rate 1:6.7518) in 2017, accounting for 24.0% of the world's total and jumping by 14.6% from a year earlier; the average annual growth rate in 2018-2022 is expected at above 10.0%.

As the automotive seat market keeps ballooning and the trend of motorized seats becomes obvious, the market for automotive seat motors has grown remarkably. In 2017, the global shipments of automotive seat motors reached 130 million units, with the CAGR of 10.6% during 2012-2017, and the figure in 2022 outnumber 190 million units. China's automotive seat motor shipments ascended 11.3% year on year to roughly 29.5 million units in 2017, sweeping 21.6% of the world; thanks to the fast-growing Chinese passenger car market (whose growth rate is higher than the global average), China's automotive seat motor shipments will go beyond 50 million units in 2022.

Amid the relatively stable competitive landscape in the global automotive seat motor market, leading manufacturers include Japan's ASMO, Nidec, Mitsuba and Mabuchi, Germany's Bosch and Brose, China's Johnson Electric, Shenghuabo Group and Founder Motor. In 2017, the world's top three automotive seat motor manufacturers -- Nidec, ASMO and Brose enjoyed the combined market share of 36.3%. Hong Kong-based Johnson Electric, the largest producer of automotive seat motor in China, seized the market share of 9.5% or so in 2017. Of the local manufacturers in Mainland China, only Shenghuabo Group and Founder Motor are quite competitive. Shenghuabo Group is the largest seat motor manufacturer in Mainland China, exports about 60% of its products, and is preparing for IPO now. Founder Motor has officially become a second-tier supplier of automotive seat motors for Tesla.

At present, the automakers are developing energy-saving technologies. Lightweight is one of the major development directions. In this sense, automotive seat motors tend to be compact and lightweight.

The report focuses on the following:

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

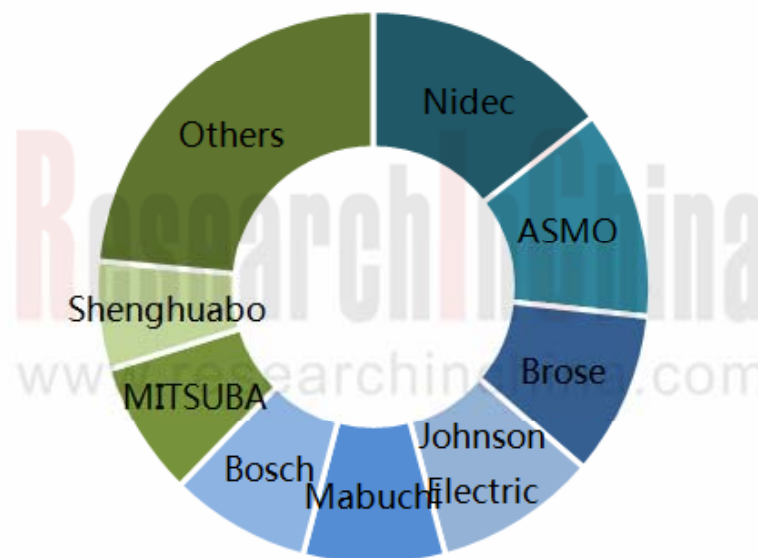
Status quo, market size, competitive landscape, etc. of the global seat motors;

Development environment, market size, competitive landscape, development trend, etc. of Chinese seat motors;

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

Operation, automotive seat motor business, etc. of 9 Chinese and 5 foreign automotive seat motor companies.

**Competitive Landscape of Global Automotive Seat Motor Market, 2017**



Source: Global and China Automotive Seat Motor Industry Report, 2018-2022 by ResearchInChina

<p><b>1. Overview of Automotive Seat Motor</b></p> <p>1.1 Automotive Power Seat</p> <p>1.2 Definition and Classification</p> <p>1.3 Technical Standards</p> <p><b>2. Global Automotive Seat Motor Industry</b></p> <p>2.1 Status Quo</p> <p>2.2 Market Situation</p> <p>2.2.1 Market Size</p> <p>2.2.2 Competitive Landscape</p> <p><b>3. China Automotive Seat Motor Industry</b></p> <p>3.1 Development Environment</p> <p>3.2 Market Situation</p> <p>3.2.1 Market Size</p> <p>3.2.2 Competitive Landscape</p> <p>3.3 Development Trend</p> <p><b>4. Downstream Automotive Seat Industry</b></p> <p>4.1 Automobile</p> <p>4.1.1 Global</p> <p>4.1.2 China</p> <p>4.2 Automotive Seat</p> <p>4.2.1 Market Size</p> <p>4.2.2 Competitive Landscape</p> <p><b>5. Foreign Automotive Seat Motor Manufacturers</b></p> <p>5.1 Nidec</p>	<p>5.1.1 Profile</p> <p>5.1.2 Operation</p> <p>5.1.3 Automotive Seat Motor Business</p> <p>5.2 Mabuchi</p> <p>5.2.1 Profile</p> <p>5.2.2 Operation</p> <p>5.2.3 Automotive Seat Motor Business</p> <p>5.3 Brose</p> <p>5.3.1 Profile</p> <p>5.3.2 Operation</p> <p>5.3.3 Automotive Seat Motor Business</p> <p>5.3.4 Shanghai Brose Electric Motors Co., Ltd.</p> <p>5.4 ASMO</p> <p>5.4.1 Profile</p> <p>5.4.2 Operation</p> <p>5.4.3 Automotive Seat Motor Business</p> <p>5.4.4 Tianjin ASMO Automotive Small Motor</p> <p>5.4.5 ASMO (Hangzhou Xiaoshan) Small Motor</p> <p>5.5 Bosch</p> <p>5.5.1 Profile</p> <p>5.5.2 Operation</p> <p>5.5.3 Automotive Seat Motor Business</p> <p>5.5.4 Bosch Automotive Products (Changsha)</p> <p>5.6 MITSUBA</p> <p>5.6.1 Profile</p> <p>5.6.2 Operation</p> <p>5.6.3 Automotive Seat Motor Business</p> <p>5.6.4 Guangzhou Mitsuba Electric (Wuhan) Co., Ltd.</p>	<p><b>6. Chinese Automotive Seat Motor Manufacturers</b></p> <p>6.1 Johnson Electric</p> <p>6.1.1 Profile</p> <p>6.1.2 Operation</p> <p>6.1.3 Automotive Seat Motor Business</p> <p>6.2 Shenghuabo Group</p> <p>6.2.1 Profile</p> <p>6.2.2 Automotive Seat Motor Business</p> <p>6.2.3 Zhejiang SHB Automotive Appliance, Shanghai Co., Ltd.</p> <p>6.2.4 Zhejiang SHB Automotive Appliance, Anhui Co., Ltd.</p> <p>6.3 Founder Motor</p> <p>6.3.1 Profile</p> <p>6.3.2 Operation</p> <p>6.3.3 Automotive Seat Motor Business</p> <p>6.4 Others</p> <p>6.4.1 Zhejiang Kefon Auto-Electric Co., Ltd.</p> <p>6.4.2 Jiangsu Yidong Aviation Machinery Co., Ltd.</p> <p>6.4.3 Zhangjiagang Heli Motor Co., Ltd.</p> <p>6.4.4 Shenzhen Puda Motor Co., Ltd.</p> <p>6.4.5 Shanghai Mansda Industrial Co., Ltd.</p> <p>6.4.6 Ningbo Shuanglin Auto Parts Co., Ltd.</p>
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