China Automotive Anti-lock Braking System Industry Report, 2018-2023

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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

As Chinese automotive industry keeps growing, there are increasingly high requirements on driving safety, thus fueling the demand for automotive anti-lock braking systems (ABS). In 2017, 27.7 million sets of automotive ABS were installed in China, up by 5.4% from a year ago. China's demand for ABS is expected to hit 33.02 million sets in 2023 at a CAGR of 3.0%.

Vehicles including hazardous article transport vehicles, semi-trailer towing vehicles, trucks (gross mass ≥ 12 tons), special motor vehicles and trailers (gross mass ≥ 10 tons) shall bear ABS; special motor vehicles (gross mass ≥ 12 tons) shall be equipped with retarders or other braking assist devices, according to the related national safety regulations such as the national standards, Technical Requirements and Testing Methods for Commercial Vehicle and Trailer Braking Systems (GB12676) and Technical Specifications for Safety of Power-Driven Vehicles Operating on Roads (GB7258) which took effect in September 2014. It is stipulated in the GB12676 standard that M2, M3, N2 and 4-axis and below N3 vehicles shall carry ABS from July 1, 2016. ABS demand is on the rise.

Product segments: the ABS on passenger cars and small commercial vehicles are largely hydraulic ones and the ABS on medium and large-sized commercial vehicles pneumatic ones. As the output and sales of passenger cars far exceeded that of commercial vehicles, 23.49 million sets of ABS were installed in passenger cars in 2017, representing an installation rate of 94.7%. As the standards GB12676 and GB7258 are implemented, the installation rate of ABS in commercial vehicles is predicted to be as high as 100%, which means 4.21 million sets will be installed.

Competitive landscape: like other auto parts, the automotive ABS market remains relatively 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 joint venture 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 rose over the years and which have helped local ABS suppliers make magnificent achievements. About half of commercial vehicle ABS market is occupied by the bellwether WABCO, while emerging Chinese players like Kormee, VIE, and JuNeng will, hopefully, further raise their market share.

China Automotive Anti-lock Braking System (ABS) Industry Report, 2018-2023 highlights the following:

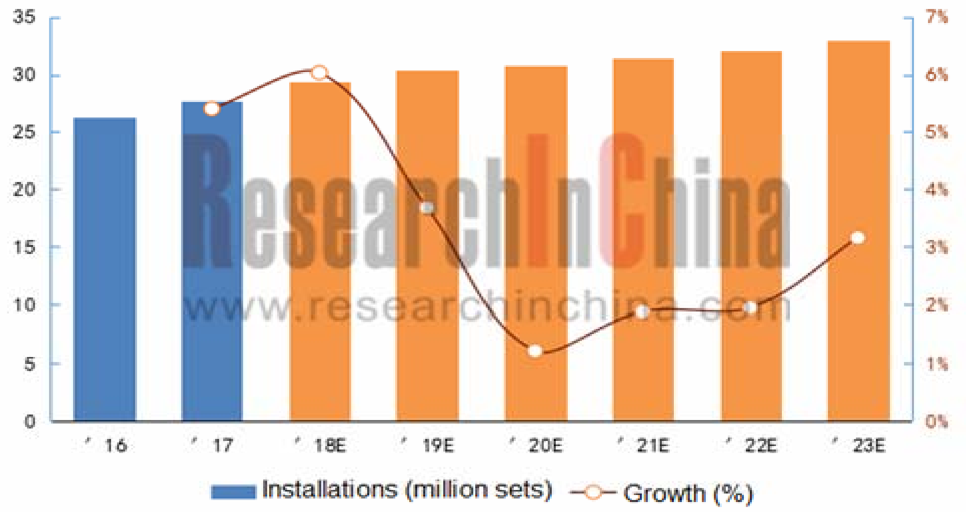
◆Automotive ABS industry in China (definition and classification, development trends, etc.);

◆Automobile industry and ABS industry in China (auto output, sales, and ownership, ABS installations, supplier 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 and KNORR) and ten 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, Dongfeng Electronic Technology and BWI Group) (profile, financials, main products, R&D, distribution of manufacturing bases, technical characteristics, etc.).

Automotive ABS Installations in China, 2016-2023E



Source: China Automotive Anti-lock Braking System (ABS) Industry Report, 2018-2023 Aug 2018

Table of contents

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Table of contents

Selected Charts

- Policies and Standards for Automotive ABS in China
- Supply Chain of Main Parts of Automotive Braking System in China
- Automobile Output in China, 2010-2023E
- Automobile Ownership in China, 2007-2023E
- Installation Rate of Automotive ABS in China, 2014-2023E
- Installations of Automotive ABS in China, 2016-2023E
- Major ABS Suppliers and Their Supported Customers in China
- Output and Sales of Passenger Cars (by Type) in China, 2017-2018
- Passenger Car Output and Sales in China, 2008-2018 (mln units)
- Passenger Car Output Forecast in China, 2017-2023 (mln units)
- Installations of ABS for Passenger Cars in China, 2012-2017
- Estimated Installations of ABS for Passenger Cars in China, 2016-2023E
- Market Share of Major Brands in ABS Supporting Market of Passenger Car in China, 2017
- ABS Matching of Passenger Car Makers in China
- Commercial Vehicle Output and Sales in China, 2008-2017
- Commercial Vehicle Output Forecast in China, 2016-2023E
- Installations of ABS for Commercial Vehicle in China, 2009-2017
- Estimated Installations of ABS for Commercial Vehicle in China, 2016-2021E
- Market Share of Major Brands in ABS Supporting Market of Commercial Vehicle in China, 2017
- ABS Matching of Major Commercial Vehicle Makers in China
- Associates of Bosch Group, 2017
- Revenue and Net Income of Bosch, 2010-2017
- Revenue Structure of Bosch by Region, 2016-2017(€ bn)
- Revenue Structure of Bosch by Business, 2016-2017(€ bn)
- Main Chassis Control System Products of Bosch

Selected Charts

- Development History of Bosch's Automotive Electronics Business
- Main Supported Models of Bosch's Braking System and Electronic Control System Products
- Diagram of iBooster
- Bosch's Revenue in China, 2012-2017
- Main ABS Production Bases of Bosch in China
- Main Automotive-related R&D Centers of Bosch in China
- Business Segments of Continental
- Revenue and EBIT of Continental, 2011-2018
- Revenue and Employees of Continental by Division, 2017
- Revenue, EBIT, and Employees of Continental's Chassis & Safety Division, 2018H1
- Main Products of Continental's Chassis & Safety Division
- Main Models Supported by Continental's Braking System and Electronic Control System Products
- Presence of Continental's Bases in China, 2017
- Profile of Continental Automotive Changchun Co., Ltd.
- Diagram for Business Reorganization of Continental
- List of ZF's Main Businesses
- Operating Result of ZF, 2016-2018 (EUR mln)
- Revenue of ZF by Region, 2016-2018
- Revenue of ZF by Business, 2016-2017 (EUR mln)
- Main Products of ZF TRW's Chassis System and Electronic Parts Divisions
- Main Models Supported by ZF's Braking System and Electronic Control System Products
- Main ABS Production Bases of ZF in China
- R&D Centers of TRW (Acquired by ZF) in China
- Global Footprints and Workforce of ADVICS
- Revenue and Profit of ADVICS, FY2015-FY2017

Selected Charts

- Workforce of ADVICS, FY2015-FY2017
- Main Products of ADVICS
- Main Models Supported by ADVICS' Braking System and Electronic Control System Products
- ADVICS' Subsidiaries in China
- Workforce of Mando in China, 2012-2017
- Revenue of Mando China, 2012-2017(KRW bn)
- Net Income of Mando China, 2012-2017(KRW bn)
- Key Products of Mando China
- Main Models Supported by Mando's Braking System and Electronic Control System Products
- Key facilities Layout for Mando China
- Basic Information (equity, customers, products, etc.) of Mando (Beijing) Automotive Chassis System Co., Ltd.
- Basic Information (equity, customers, products, etc.) of Mando (Suzhou) Automotive Chassis System Co., Ltd.
- Basic Information (equity, customers, products, etc.) of Mando (Ningbo) Automotive Parts Co., Ltd.
- Global Footprints of Nissin Kogyo
- Revenue and Net Income of Nissin Kogyo, FY2015-FY2018
- Revenue of Nissin Kogyo by Region, FY2017-2018
- Revenue of Nissin Kogyo by Business, FY2016-FY2018
- Main Models Supported by Nissin Kogyo's ABS Products
- Revenue Structure of Nissin Kogyo by Customer, FY2016-FY2018
- Main Production Bases of Nissin Kogyo in China
- Main Products of Zhongshan Nissin Industry
- Capacity of Main Products of Zhongshan Nissin Industry (as of Nov. 2016)
- Revenue and Operating Margin of Hyundai Mobis, 2015-2018
- Operating Data of Hyundai Mobis by Region, 2017
- Operating Data of Hyundai Mobis by Business, 2017

Selected Charts

- Key Parts of Braking System of Hyundai Mobis
- Production Bases of Hyundai Mobis in South Korea
- Main Models Supported by Hyundai Mobis' Braking System and Electronic Control System Products
- Hyundai Mobis' Subsidiaries in China
- Basic Information of Wuxi MOBIS Automotive parts Co., Ltd.
- Basic Information of Tianjin MOBIS Automotive Parts Co., Ltd.
- Global Presence of Operations of WABCO
- Revenue and Operating Income of WABCO, 2014-2016
- Revenue of WABCO by Region, 2016-2017
- Revenue of WABCO by Business, 2016-2017
- Main Products of WABCO
- WABCO's Subsidiaries in China
- Main Production Bases of WABCO in China
- Basic Information and Supported Customers of Shandong Weiming Automotive Products Co., Ltd.
- Overview of WABCO Vehicle Control Systems (China) Co., Ltd.
- Revenue and Net Income of Knorr-Bremse, 2013-2017
- Revenue of Knorr-Bremse by Region, 2017
- Revenue of Knorr-Bremse by Business, 2016-2017
- Main Products of Knorr-Bremse's Commercial Vehicle Systems Division
- Subsidiaries of Knorr-Bremse's Commercial Vehicle Systems Division in China
- Revenue and Net Income of Zhejiang Asia-Pacific Mechanical & Electronic, 2011-2018
- Revenue of Zhejiang Asia-Pacific Mechanical & Electronic by Product, 2016-2018
- Gross Margin of Zhejiang Asia-Pacific Mechanical & Electronic, 2012-2018
- Revenue from Top 5 Customers of Zhejiang Asia-Pacific Mechanical & Electronic, 2016-2017
- Enterprises and Models Supported with EBS of Zhejiang Asia-Pacific Mechanical & Electronic

Selected Charts

- Marketing Network of Zhejiang Asia-Pacific Mechanical & Electronic
- Layout of Zhejiang Asia-Pacific Mechanical & Electronic in Intelligent Vehicle Industry Chain
- Products of Shenzhen Forward Innovation Digital Technology
- "Tima Cloud" Telematics Integrated Application System
- Fundraising Projects of Zhejiang Asia-Pacific Mechanical & Electronic by Issuing Convertible Bonds, 2017
- Revenue, Net Income and Gross Margin of Zhejiang Asia-Pacific Mechanical & Electronic, 2017-2022E
- Main Business of HUAYU Automotive Systems
- Revenue and Net Income of HUAYU Automotive Systems, 2014-2018
- Revenue of HUAYU Automotive Systems by Product, 2017-2018
- Output and Sales Volume of HUAYU Automotive Systems by Product, 2018H1
- Equity Structure of Shanghai Automotive Brake Systems
- ABS Supply Relationship of Shanghai Automotive Brake Systems
- Winter Test Center of Shanghai Automotive Brake Systems
- Revenue and Net Income of Zhejiang Vie Science & Technology, 2011-2018
- Revenue of Zhejiang Vie Science & Technology by Product, 2016-2018
- Gross Margin of Zhejiang Vie Science & Technology by Product, 2014-2018
- Main Commercial Vehicle Products of Zhejiang Vie Science & Technology
- Main Passenger Car Products of Zhejiang Vie Science & Technology
- Main Customers of Zhejiang Vie Science & Technology
- Main Production Bases and Supported Customers of Zhejiang Vie Science & Technology
- Business Development Roadmap of Zhejiang VIE Science & Technology
- Operating Indices of Wuhu Bethel Automotive Safety Systems, 2013-2017
- Operating Revenue of Wuhu Bethel Automotive Safety Systems by Product, 2014-2016
- Products and Customer of Wuhu Bethel Automotive Safety Systems
- Revenue Structure of Wuhu Bethel Automotive Safety Systems by Product, 2015-2017

Selected Charts

- Gross Margin of Wuhu Bethel Automotive Safety Systems by Product, 2015-2017
- Top 5 Customers of Wuhu Bethel Automotive Safety Systems, 2013-2017
- Procurement of Main Raw Materials of Wuhu Bethel Automotive Safety Systems, 2014-2017
- Top 5 Raw Material Suppliers of Wuhu Bethel Automotive Safety Systems, 2013-2017
- Production Lines and Capacity of Wuhu Bethel Automotive Safety Systems, 2015-2017
- ABS Pneumatic Production Technology of Wuhu Bethel Automotive Safety Systems
- ABS/ESC Hydraulic Production Technology of Wuhu Bethel Automotive Safety System
- Output and Sales Volume of Wuhu Bethel Automotive Safety System by Product, 2015-2017
- Prices of Main Products of Wuhu Bethel Automotive Safety System, 2015-2017
- Fundraising Projects of Wuhu Bethel Automotive Safety System by Initial Public Offering, 2017
- Major Customers of Wuhu Bethel's Projects with Raised Funds
- Revenue, Net Income and Gross Margin of Wangxiang Qianchao, 2013-2018
- Operating Revenue and Gross Margin of Wangxiang Qianchao by Business, 2014-2018
- Operating Revenue and Gross Margin of Wangxiang Qianchao by Region, 2014-2016
- ABS Subsidiaries of Wangxiang Qianchao, 2017
- Output and Sales Volume of Wangxiang Qianchao by Product, 2016-2017
- Overview of Wanxiang Research Institute
- R&D Expenditure of Wanxiang Qianchao, 2016-2017
- Braking System Supply Relationship of Wangxiang Qianchao
- Fundraising Projects of Wangxiang Qianchao by Allotment of Shares, 2017
- Revenue, Net Income and Gross Margin of FAWER Automotive Parts, 2013-2018
- Operating Revenue and Gross Margin of FAWER Automotive Parts by Region, 2014-2018
- Operating Revenue and Gross Margin of FAWER Automotive Parts by Business, 2014-2016
- Regional Distribution and Customers of FAWER Automotive Parts
- Output and Sales Volume of FAWER Automotive Parts by Product, 2014-2017

Selected Charts

- Braking System Subsidiaries of FAWER Automotive Parts
- Revenue, Gross Margin and Net Income of Guangzhou Kormee Automotive Electronic Control Technology, 2014-2017
- ABS Supply Relationship of Guangzhou Kormee Automotive Electronic Control Technology
- Revenue and Net Income of Holding Subsidiaries of Guangzhou Kormee Automotive Electronic Control Technology, 2015-2017
- ABS Supply Relationship of Chongqing Juneng Automotive Technology
- Operating Revenue and Gross Margin of Dongfeng Electronic Technology by Business, 2014-2017
- Output and Sales Volume of Dongfeng Electronic Technology by Product, 2014-2017
- Sales Volume of Main Products of Dongfeng Electronic Technology in Supporting Market, 2017
- Capacity of Main Products and Utilization Rate of Dongfeng Electronic Technology, 2017
- Global Presence of BWI Group
- ABS Products of BWI Group
- Major Customers of BWI Group

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