



# Global and China Automotive Seating Industry Report, 2018-2023

December 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

In 2018, global automotive seating market size remained at around USD77.9 billion, of which the Chinese market was worth RMB113.2 billion (approximately USD16.45 billion by USD to RMB 1:6.8779). As automotive market is saturated, global and Chinese automotive seating markets will level out, with market size expectedly growing at a respective annual average of 3.6% and 1.9% between 2018 and 2023. Safe intelligent seating will be a major driver for the market growth.

In global market, the top10 automotive seating giants like Adient, Lear, Toyota Boshoku and Faurecia currently grab a combined share of over 90%. Among them, Adient, the biggest player, forges long-term partnerships with automakers by establishing joint ventures with them, with a large client base almost covering all OEMs; Lear has four major clients, i.e., Ford, GM, BMW and FCA for targeting North American and European markets.

In China, Adient and Lear are the two suppliers of seating systems for American and German automobiles; for Japanese auto brands, TS is the only supplier of Honda and Toyota Boshoku supplies most seating products for Toyota while Nissan has more suppliers. Most Chinese auto brands also use products of joint venture manufacturers, for example, Great Wall Motor, BYD, Chery and Geely produce some themselves but also purchase from suppliers. Co-funded auto brands have their upsides in price and performance, boasting scale effects and complete supply chain; homegrown automakers set up their own seating divisions just for a say in market and a more flexible supply chain.

Automotive seats trend to be safe, intelligent, personalized, lightweight, green and comfortable in the era of “intelligent, electrified, connected and shared” vehicles. Many a seating manufacturer like Lear, Adient and Faurecia already makes layout of intelligent seating which will be deeply integrated into connected vehicles, providing passengers with intelligent, safe and comfortable driving experience.

In addition to technological upgrades, seating companies' complete seating solutions will be the megatrend of the industry, leading to frequent M&As among seating vendors.

Global and China Automotive Seating Industry Report, 2018-2023 highlights the following:

- ◆Automotive seating (overview, composition, functions, classification, industry chain, etc.);
- ◆Global automotive seating industry (market size, competitive pattern, supply pattern of major automakers, development trends, etc.);
- ◆China automotive seating industry (market size, competitive pattern, supply pattern of major automakers, development trends, etc.);
- ◆Major global and Chinese automotive seating companies (operation, seating business, development tendencies, etc.).

### Intelligent Layout of Major Global Automotive Seating Companies

Company	Intelligence Layout
Lear	Develop seats that can adjust themselves ahead of dangers.
Lear	Invest Tempronics, providing Lear with the best seat design and the ability to heat and cool seats faster with less energy.
Lear	SoundZone system – a personalized audio solution that enables headrest to sense occupants and move forward or backward with them.
Lear	Collaborate with Honeywell to co-develop vehicle software technologies and infrastructure solutions.
Adient	Partner with Autoliv to improve airbag system of existing seats.
Apple	A simple vibration of the seat or a slight change in chair positioning for best view can provoke a driver to pay attention and control the vehicle.
Magna	Release SomaTemp™ seat, heating or cooling by conduction.
Faurecia	Invest Promethient, a company designing and producing Thermavance, a climate control technology that heats and cools through conductive heat transfer, delivering higher efficiency than current convective technology.
Faurecia	Invest SUBPAC, a company providing a deeply immersive and tailored music and media experience by silently transferring low frequencies directly to the body.
Tachi-S	Cooperate with Clarion to develop InfoSeat system which provides drivers with situational awareness alerts through seat vibrations and audio/visual cues and also includes the InfoSeat headrest speaker system which creates isolated audio zones for music, phone calls, and ADAS alerts.

Source: ResearchInChina

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### **1 Brief Introduction to Automotive Seating**

- 1.1 Structure
- 1.2 Classification
- 1.3 Industry Chain

### **2 Global Automotive Seating Market**

- 2.1 Market Size
- 2.2 Top10 Automotive Seating Companies
- 2.3 Regional Structure
- 2.4 Automotive Seating Suppliers for OEMs
- 2.5 Development Trend

### **3 China Automotive Seating Market**

- 3.1 Market Size
- 3.2 Competitive Landscape
- 3.3 Automotive Seating Suppliers for OEMs

### **4. Global and China Automotive Market**

- 4.1 Global
  - 4.1.1 Output
  - 4.1.2 Sales
- 4.2 China
  - 4.2.1 Market Size
  - 4.2.2 Structure

### **5. Automotive Seating Companies**

- 5.1 Adient

- 5.1.1 Profile
- 5.1.2 Operation
- 5.1.3 Seating Business
- 5.1.4 Development in China
- 5.1.5 Yanfeng Adient
- 5.1.6 Changchun Faway Adient Automotive System Co., Ltd. (CFAA)
- 5.2 Lear
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 Seating Business
  - 5.2.4 Development in China
  - 5.2.5 Development Trend
- 5.3 TOYOTA BOSHOU
  - 5.3.1 Profile
  - 5.3.2 Operation
  - 5.3.3 Development in China
  - 5.3.4 Tianjin Intex Auto Parts Co., Ltd.
  - 5.3.5 Development Planning
- 5.4 Faurecia
  - 5.4.1 Profile
  - 5.4.2 Operation
  - 5.4.3 Seating Business
  - 5.4.4 Development in China
- 5.5 TS Tech
  - 5.5.1 Profile
  - 5.5.2 Operation
  - 5.5.3 Development in China

5.5.4 Guangzhou TS Automotive Interior Systems Co., Ltd.	5.13.2 Operation
5.5.5 Wuhan TS-GSK Auto Parts Co., Ltd.	5.13.3 Development in China
5.5.6 Development Planning	5.14 DAEWON
5.6 TACHI-S	5.14.1 Profile
5.6.1 Profile	5.14.2 Operation
5.6.2 Operation	5.14.3 Seating Business
5.6.3 Development in China	5.14.4 Development in China
5.7 Magna	5.15 DYMOS
5.7.1 Profile	5.15.1 Profile
5.7.2 Operation	5.15.2 Operation
5.7.3 Seating Business	5.15.3 Seating Business
5.7.4 Development in China	5.15.4 Development in China
5.8 Brose	5.15.5 Beijing Lear Dymos Automotive Systems Co., Ltd.
5.8.1 Profile	
5.8.2 Operation	
5.8.3 Seating Business	
5.8.4 Development in China	
5.9 NHK Spring	
5.9.1 Profile	
5.9.2 Operation	
5.9.3 Seating Business	
5.9.4 Development in China	
5.10 SITECH	
5.11 Wuhan Xinyunhe Automotive Seating Co., Ltd.	
5.12 GSK	
5.13 DAS	
5.13.1 Profile	

- Composition of Automotive Seating
- Cushion Frame
- Back Frame
- Head Restraint
- Lever Control
- Slide
- Covering ASSY
- Pad Foam ASSY
- Recliner ASSY
- Lumbar Support ASSY
- Automotive Seat Regulating System and Motors Utilized
- Classification of Automotive Seating
- Major Players in Automotive Seating Industry Chain
- Automotive Seating Industry Chain
- Global Automotive Seating Market Size, 2013-2023E
- Ranking of Global Top 10 Automotive Seating Manufacturers by Revenue 2014-2018
- Market Share of Major Seating Manufacturers for Passenger Car in North America, 2017
- Market Share of Major Seating Manufacturers for Passenger Car in Europe, 2017
- Market Share of Major Seating Manufacturers for Passenger Car in Japan, 2018
- Share of Automotive Seating Suppliers for TOYOTA, 2018
- Share of Automotive Seating Suppliers for HONDA, 2018
- Share of Automotive Seating Suppliers for NISSAN, 2018
- Share of Automotive Seating Suppliers for VW, 2018
- Share of Automotive Seating Suppliers for BMW, 2018
- Share of Automotive Seating Suppliers for BENZ, 2018

- Share of Automotive Seating Suppliers for GM, 2018
- Share of Automotive Seating Suppliers for FORD, 2018
- Share of Automotive Seating Suppliers for HYUNDAI, 2018
- Development Direction of Automotive Seating
- Intelligent Layout of Global Major Seating Companies
- Intelligent Seating Layout of Lear
- China Automotive Seating Market Size, 2015-2023E
- Market Share of Major Manufacturers in Chinese Passenger Car Seating Market, 2018
- Share of Automotive Seating Suppliers for SAIC, 2018
- Share of Automotive Seating Suppliers for FAW, 2018
- Share of Automotive Seating Suppliers for CHANGAN, 2018
- Share of Automotive Seating Suppliers for Dongfeng, 2018
- Share of Automotive Seating Suppliers for BAIC, 2018
- Global Automobile Output, 2013-2023E
- Global Automobile Output Structure, 2010-2017
- Global Automobile Output by Region, 2012-2017
- Top 20 Countries by Automotive Output, 2017
- Global Automobile Sales Volume, 2013-2023E
- Global Automobile Sales Volume by Region, 2012-2017
- Top 10 Countries by Automobile Sales, 2012-2017
- China Automobile Sales Volume, 2013-2023E
- China Passenger Car Sales Volume, 2010-2018
- China Commercial Vehicle Sales Volume, 2010-2018
- Sales Volume Structure of SUVs in China (by Price), 2016-2017
- Sales Volume Structure of Sedans in China (by Price), 2016-2017



- Top10 Passenger Car Makers by Sales Volume, 2017
- Sales Volume of Top10 Passenger Car Brands by Model in China, 2017
- Sales Volume of Top10 Passenger Car Brands by Model in China, 2018(Jan.-Oct.)
- Sales Structure of Passenger Car (by Country) in China, 2017
- Global Footprint of Adient
- Global Presence of ADIENT Production Bases, FY2018
- Operation of Adient, FY2017-FY2018
- Revenue Structure of Adient by Region/Customer, FY2017
- Revenue Structure of Adient by Region, FY2017
- Market Share of Adient
- Seating Business Orders of Adient, FY2018-FY2020
- Market Share of Adient Seating Business among Each OEM Group
- Market Share of Adient Seating by Automotive Brand, FY2017& FY2021
- Adient's Purchase of Futuris in 2017
- Footprint of Adient in China, 2018
- Operation of Adient in China, 2013-2017
- Adient Seating China
- Adient Joint Venture Structure
- Adient China's Current Seating Market Share
- Company Overview of Yanfeng Automotive Interiors
- Distribution of Production Bases and Subsidiaries of Yanfeng Adient
- Operation of Yanfeng Adient, 2017
- Major Clients of Yanfeng Adient
- Major Subsidiaries of Adient
- Global Footprints of Lear, 2018

- Net Sales and Gross Margin of Lear, 2012-2018
- Key Financials of Lear, 2018Q3
- Net Sales of Lear by Customer, 2017
- Net Sales of Lear by Business, 2014-2017
- Operation of Lear by Segment, 2018Q3
- Revenue of Lear by Business, 2012-2022E
- Sales Backlog of Lear, 2018-2020E
- Seating Component Capabilities of Lear, 2018
- Key Seating Launches of Lear, 2018-2019
- Automotive Seating Operations of Lear Worldwide, 2018
- Revenue Structure of Lear Seating Business by Region, 2017
- Revenue Structure of Lear Seating Business by Product, 2017
- Revenue Structure of Lear Seating Business by Customer, 2017
- Market Share of Lear Seating Business by Region, 2018
- Seating Business Quarter Sales and Margin Drivers, 201Q3
- Global Engineering Development of Lear Seating Business
- Development Trend of Lear Seating Products
- Sales and Operating Margins of Lear, 2023E
- Net Sales and Operating Margin of TOYOTA BOSHKOU, FY2010-FY2019
- Net Sales of TOYOTA BOSHKOU by Region, FY2010-FY2019
- Shipment of TOYOTA BOSHKOU by Region, FY2011-FY2019
- Shipment of TOYOTA BOSHKOU Seat Assembly by Region, FY2019H1
- Operating Profit of TOYOTA BOSHKOU by Region, FY2011-FY2019
- Seat Shipment of TOYOTA BOSHKOU, FY2011-FY2019
- Subsidiaries of TOYOTA BOSHKOU in China

- Development Layout of TOYOTA BOSHKOU in China, 2020E
- New Technologies and New Products of TOYOTA BOSHKOU, 2030E
- Integration of Seating Industry Chain of TOYOTA BOSHKOU, 2020E
- Seating Business Capacity Expansion Plan of TOYOTA BOSHKOU, 2019-2022E
- Revenue and Operating Margin of Faurecia, 2008-2017
- Revenue of Faurecia by Business, 2015-2018
- Revenue Structure of Faurecia by Business, 2017
- Revenue Breakdown of Faurecia by Country/Region, 2015-2017
- Revenue Structure of Faurecia by Customer, 2017
- Revenue Structure of Faurecia by Customer, 2015-2017
- Seating Supporting of Faurecia, 2018-2021E
- Sales Offices Newly Established by TS Tech in 2018
- Net Sales and Operating Margin of TS Tech, FY2009-FY2019
- Revenue Breakdown of TS Tech by Business, FY2016-FY2018
- Revenue Breakdown of TS Tech by Region, FY2010-FY2019
- Operating Profit of TS Tech by Region, FY2010-FY2019
- Automotive Seating Sales Volume of TS Tech, FY2017-FY2018
- Motorcycle Seat Production of TS Tech, FY2017-FY2018
- Key Models Supported by TS Tech Seat, 2018-2019
- Development of TS Tech in China, FY2019H1
- Sales of TS Tech in China, FY2017-FY2019Q2
- Development Planning of TS Tech
- Seating Development Orientation of TS Tech
- Global Footprint of TACHI-S
- R&D Centers of TACHI-S Worldwide, 2020

- Net Sales and Operating Margin of TACHI-S, FY2009-FY2019
- Net Sales of TACHI-S by Country/Region, FY2016-FY2019
- Operating Profit of TACHI-S by Country/Region, FY2016-FY2019
- Revenue of TACHI-S by Customer, FY2016-FY2019
- Seat Sales Volume of TACHI-S, FY2014-FY2018
- Vehicle Models Supported by Seats of TACHI-S, 2018
- TACHI-S Strengthens Competitiveness of Components/Monozukuri (Frame), 2020
- TACHI-S Strengthens Competitiveness of Components/Monozukuri (Sewing), 2020
- TACHI-S as a Provider of Seats for Geely EV450
- Honda Motor N-VAN
- Vehicle Models Supports by Seats of TACHI-S, 2018-2019
- Presence of TACHI-S' Subsidiaries in China, 2018
- Presence of TACHI-S in China, 2020
- Global Footprint of Magna
- Sales and Operating Margin of Magna, 2015-2018E
- Sales of Magna by Region, 2016-2017
- Sales of Magna by Customer, 2015-2017
- Seating Systems of Magna
- Magna Development of Seating Systems, 2017-2020E
- Seating Business (by Vehicle Model) Market Share of Magna, 2017
- Seating Development History of Magna
- New Clients for Magna's Seating Business
- Continued Vertical Integration of Magna Seating Segment
- Revenue and Investment of Brose, 2009-2018E
- Revenue of Brose by Business, 2014-2017

- Major Customers of Brose
- Seat Supply of Brose, 2018
- Presence of Brose's Subsidiaries in China
- Business Distribution of NHK Spring
- Net Sales and Operating Margin of NHK Spring, FY2009-FY2019
- Sales of NHK Spring by Business, FY2009-FY2019
- Operating Profit of NHK Spring by Business, FY2009-FY2019
- Sales of NHK Spring by Region, FY2009-FY2019
- Sales Structure of NHK Spring by Customer, FY2016-FY2018
- Automotive Seating Sales of NHK Spring, FY2015-FY2019
- Seating Investment Projects of NHK Spring, 2018
- Subsidiaries of NHK Spring in China
- Major Customers of GSK
- Major Clients of DAS
- Vehicle Models Supported by Seating-related Products of DAS, 2018
- Operations of DAEWON
- Key Auto Parts of DAEWON
- DAEWON's Components for High-speed Trains
- Major Clients of DAEWON
- Presence of DAEWON in China
- Global Network of DYMOS
- Revenue of DYMOS, 2013-2017
- Net Income of DYMOS, 2013-2017
- Seat Sales of DYMOS, 2012-2020
- Seating Operations of DYMOS Worldwide

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