

Global and China Automotive Seating Industry Report, 2019-2025

Dec. 2019

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 global demand for automotive seats (many of which are for replacing old ones) is rising alongside the increasing ownership of automobiles worldwide. Automobile production upgrading requires automotive seats to be more comfortable, greener, lighter, safer and more intelligent. Lightweight seat design and production now means a lot.

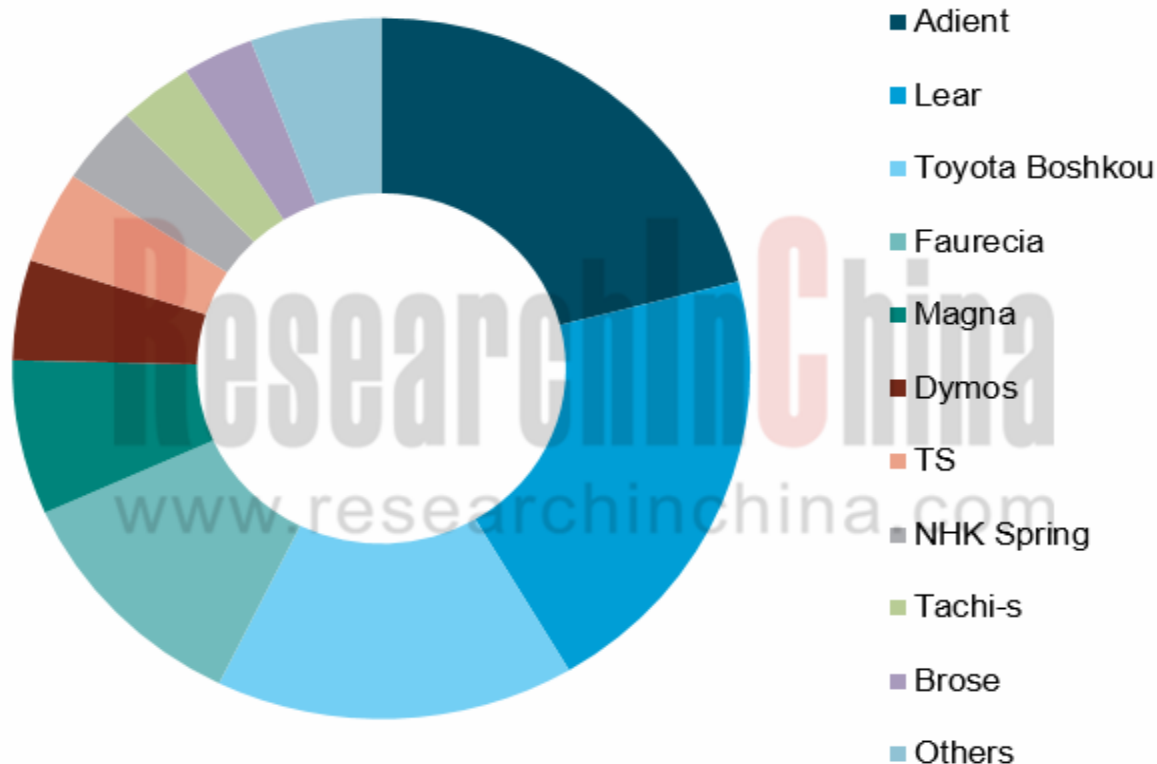
In 2019, global automotive seating market was valued at around \$80 billion, up by 2.7% from a year ago, of which the Chinese market was worth RMB114.8 billion, 1.4% more than what it was in the previous year. As global automotive market becomes saturated, automotive seating market will grow at a slow pace and sustain a growth rate of 3% or so in the forthcoming years, expectedly reaching \$95 billion in 2025 when the Chinese market will be RMB133.5 billion.

On a global basis, 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 involving almost all OEMs; Lear targeting North American and European markets has four major clients, i.e., Ford, GM, BMW and FCA.

In China, Adient and Lear monopolize the passenger car OEM seat market; most Chinese auto brands also use products of joint-venture seat brands. For instance, Great Wall Motor, BYD, Chery and Geely produce some by themselves and purchase seating systems from other suppliers as well. The joint-venture seat brands have upsides in price and performance, boasting scale effects and complete supply chain; Chinese 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 an era of “intelligent, electrified, connected and shared” vehicles.

Global Automotive Seating Market Structure by Enterprise, 2019



Source: ResearchInChina

Lightweight is unavoidable in automotive production, not only saving fuel and energy (tests show that a 10% reduction in curb weight leads to 6%-8% higher fuel efficiency; a 100kg reduction in curb weight cuts down fuel consumption by 0.3L-0.6L per 100km) but helping achieve environmental goals.

Intelligence also holds a trend for automotive seating. Famous foreign brands like Lear, Adient and Faurecia have already made deployments in intelligent seating which will be closely combined with telematics, offering occupants with smart, safe and comfortable driving experience.

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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

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Automotive Seating Industry Chain

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