

# **Global and China Automotive Seat Motor Industry Report, 2020-2026**

**December 2020**

## 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.

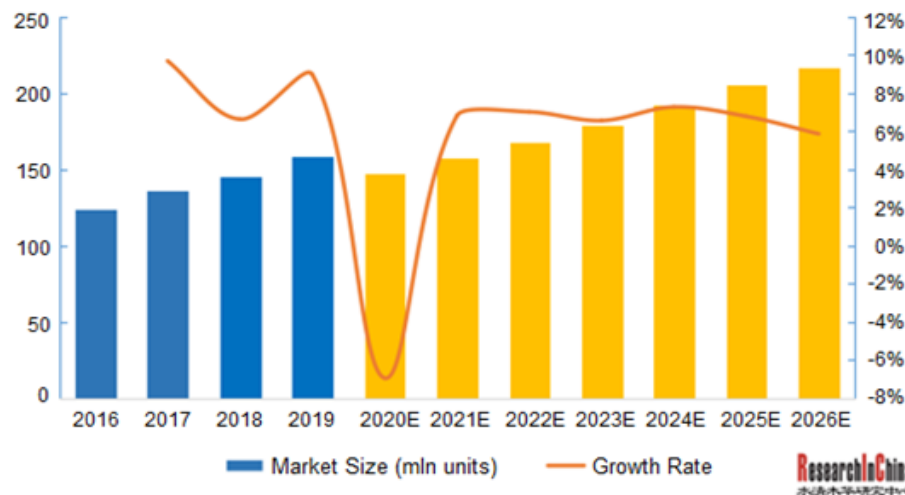
## INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

Automotive seat as a key integral of a car concerns ride comfort and safety, and it is growing ever versatile with technological advances. Power seat or electric seat has come to the fore in the market, possessing height regulating motor, sliding motor, electronic control module, heater, massager, memory among others. Power seat was first available onto some luxury cars and then equipped progressively to the medium and high-grade models whose sales boom in turn helps a rise in the installation rate of electric seats, which is naturally a boon for the burgeoning demand for automotive seat motors. In 2019, global shipments of power seat motor reached 157 million units, a figure projected to be approximately 147 million units in 2020 due to the still devastating COVID-19 worldwide, to hopefully recover as the pandemic eases and draw close to 217 million units in 2026.

Global Shipments of Automotive Seat Motor and Growth Rate, 2016-2026E



Source: Global and China Automotive Seat Motor Industry Report, 2020-2026 Dec.2020

The production and sales of upscale cars is on a steady rise annually in China, the largest producer and consumer of automobiles in the world, calling for more and more automotive seat motors whose shipments in the country in 2019 posted 30.9 million units and enjoyed a global share of more than 24.3%. The faster growing Chinese seat motor market than the global market arises from a transfer of the market demand to the medium- and high-end products and a spurt in sales growth of medium- and high-grade passenger cars, invigorating the seat motor sector measurably. suppliers.

In the global market of automotive seat motors, Japanese players lead the pack and four out of the world's top eight seat motor tycoons are from Japan (Denso, Nidec, Mitsuba, and Mabuchi), holding market shares 45% together. Besides, German-based Bosch, Brose and Chinese peers Johnson Electric and Shenghuabo Group are the competitive suppliers.

Boasting at least 300 branches and operations in over 40 countries, Nidec Corporation dedicates itself to the R&D, production and sale of precision small motors to ultra-large electric motors. Also is Nidec second to none in vehicle motor field, sweeping roughly 16.5% shares in 2019 in the automotive seat motor market and ranking first. Nidec entered China in 1989 and is now in possession of 36 plants, 54 marketing companies and offices with a workforce of virtually 40,000 there. In June 2020, Nidec announced to lavish about JPY100 billion or RMB6.5 billion for building a factory (where a R&D base settles) in Dalian city, China, and the base is to produce the driving motors for both battery electric vehicle and home appliances.

As one of the largest suppliers of auto parts and systems in the world, Denso Corporation has 179 associated companies in more than 30 countries and regions. With its automotive motor business mainly from ASMO, Denso is aggressively seeking innovations in its state-of-the-art technologies and electromechanical products and had a business reshuffle with ASMO in 2017 (incorporating the latter' motor business inclusive of automotive seat motor to Denso). In 2019, Denso held a global share of 13.1% or so in the automotive seat motor market. Denso (Tianjin) Motor Co., Ltd is the largest manufacturing base for automotive seat motors of Denso in China, with annual capacity outnumbering 3 million units.

Established in 1959, Johnson Electric is a large multi-national corporation from Hong Kong (China) and has a strong market leadership in the design, R&D and production of micro motors and integrated motor systems. With about 35,000 contract workers in 23 countries, Johnson Electric is a global leading provider delivering total seat driving solutions for front/rear seat, seat tilt, height regulation, seat reclining, headrest regulation, lumbar support and seat haptic feedback. It seized a global market share of 10.1% in 2019.

Global and China Automotive Seat Motor Industry Report, 2020-2026 highlights:

- ◆ Automotive seat motor (definition, classification, technical standards, etc.);
- ◆ Global automotive seat motor market (status quo, market size, competitive landscape, etc.);
- ◆ China automotive seat motor market (development environment, market size, competition pattern, tendencies, etc.);
- ◆ Downstream sectors including automobile and automotive seating (market size, competition pattern, etc.);
- ◆ Six foreign companies (Nidec, Denso, Mitsuba, Mabuchi, Bosch, Brose) and nine Chinese counterparts like Johnson Electric, Shenghuabo Group, Zhejiang Founder Motor and Ningbo Shuanglin Auto Parts (operation, automotive seat motor business, etc.)

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- 1.1 Automotive Power Seat
- 1.2 Definition and Classification
- 1.3 Technical Standards

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- 2.1 Status Quo
- 2.2 Market Situation
  - 2.2.1 Market Size
  - 2.2.2 Competitive Landscape

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