

Global and China Automotive Seating Industry Report, 2020-2021

Mar.2021

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

Our recent report Global and China Automotive Seating Industry Report, 2020-2021 highlights the following: development history of automotive seating, industry pattern, market size, supplier relationships, “CASE” (Connected, Autonomous, Shared, Electrified) and cooperation dynamics of major automotive seat manufacturers, and ten trends for automotive seating industry in an upsurge of CASE.

Automotive seat is the interior component that occupants contact for the longest time during the ride. Since the world’s first automobile came into being in 1885, automotive seat has evolved for over a century from a simple component into a practical tool offering comfort and safety.

Global automotive seating market is dominated by American, European and Japanese brands.

In 2019, North American, Japanese and European seat manufacturers commanded around 50%, 14% and 11% of the global market, separately. China’s automotive seating market is grabbed by foreign companies such as Adient and Lear and their affiliates and Toyota Boshoku, or foreign-funded joint ventures, which together sweep more than 60%.

Ten trends for automotive seating industry amid CASE

Under the development trend of CASE, the tide of software-defined cars is unstoppable. However, software cannot define everything about vehicles. Traditional auto parts manufacturers still have many core technologies, which cannot be replaced by emerging auto-making forces, such as automotive settings. Seat manufacturers have also made a lot of intelligent improvements to seats according to the development needs of intelligent connected vehicles. We summarized the ten development trends for automotive seating industry amid CASE boom.

Trend 1: Multi-scenario Application

In future, autonomous vehicle cockpit will be a mobile space for office, living and entertainment, so seat needs to transform for different application scenarios. An example is the next-generation reconfigurable seating concept Magna showcased at CES 2019. Users can reconfigure seats via their smartphone APP, with reconfigurable modes including vehicle sharing, long journey, and autonomous shared mobility.

Shared Mobility—Surrounding Party Meeting Mode



Source: Magna

Family mode

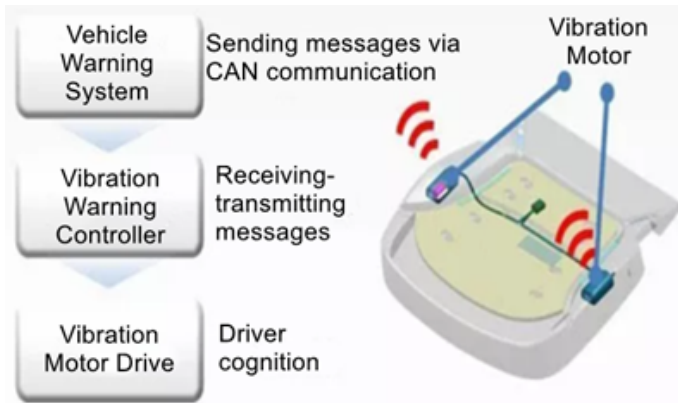


Exclusive mode



Source: YF Automotive Interior

Trend 2: Integration with ADAS



In future, automotive seat that plays a crucial role in vehicle safety will integrate with ADAS to deliver more driving assistance capabilities. Examples include InfoSeat, an automotive seating system TACHI-S and Clarion co-developed and launched in 2019: when the vehicle travels too close to the front vehicle or the driver is drowsy, the vibration device installed in the seat will send a vibrative warning to occupants.

Intelligence Deployments of Major Global Automotive Seat Manufacturers

| Company | CASE Deployment |
|-----------------|---|
| Faurecia | Develop Natural Motion innovative seat adjustment technology |
| | Develop new modes for seat control and adjustment; recognize passengers' intention according to their postures to make seats adjust automatically |
| Lear | Joined hands with Gentherm to introduce INTU Thermal Comfort seating with ClimateSense technology |
| | Developed ConfigurE+, an adaptable seating system to be produced with a European luxury car manufacturer in 2020 |
| Adient | Worked together with Autoliv to enhance existing seat airbag systems |
| TACHI-S | Cooperated with Clarion to develop InfoSeat system featuring built-in microphone and speaker, vibration device, and music and warning capabilities |
| | Worked together with SEIREN Co., Ltd. to develop replacement cover seats making it easy for users to change seat covers; provide "car-sharing" businesses with commercial services, e.g., information spreading, price planning, pre-order, and online settlement |
| | Develop Concept X-4, a future automotive seat designed for automated driving scenarios |
| Brose | Teamed up with Vayyar for integrating sensor systems into power seat adjustment systems and interior/exterior drive systems |
| Hyundai Transys | Develop intelligent seats that can interact with humans |
| | Develop autonomous vehicle seats with Algoriqo |
| | Cooperated with Brose to develop seat components for autonomous and electric vehicles |

Trend 3: Intelligent Control

At present, CASE is reshaping the automotive industry. Facing the disruption in automotive industry, seat manufacturers race to double down on intelligence deployment by way of such as cooperation and independent development. Future intelligent seats can not only provide comfortable experience but learn to "know" what passengers want with AI technology and adjust and control themselves without any active operation. For instance, the fusion of sensors and seats makes seat control mode change from conventional button to intelligent control methods, e.g., APP, gesture control and intention perception.

Trend 4: Intelligent Monitoring

In future, automotive seat will also act as a “health manager” that can monitor heart and breath rates. Examples include HiRain Technologies’ intelligent automotive seating system with the ability to intelligently monitor health, heart and breath rates, and temperature.

Trend 5: Personalization

As well as function intelligence, personalized design holds a trend for automotive seat, helping users to create a more private interior space. In the case of gender-targeted design, ambient lamps are used to build exclusive private sound areas.

Trend 6: Modularization

Brose Seat Modular Development Platform



Source: Brose

Automotive modular platform that helps automakers reduce cost, development time, vehicle weight and fuel consumption will be well-welcomed. For example, Brose’s complete seat modular structure allows for higher uniformity of motors in size for quick response to different customers’ needs for—any drive for basic capabilities such as adjusting length, height, seat tilt and backrest tilt, serving as an efficient supplement in comfort and safety.

Application of Intelligent Surface - Seat Adjustment at Side Window



Trend 7: Application of Intelligent Surface

As intelligent cockpit booms, decorative, functional intelligent automotive surface attracts ever more attention from industry players. Examples include BWM Vision iNext, a concept car fully demonstrating which direction intelligent automotive surface will head in. iNext allows users to operate the infotainment system by interacting with and tracking symbols on seat or side panel woven fabrics with their fingers, which replaces traditional buttons and touch screen control capability.

Trend 8: Replacement Cover Seat

The growing awareness of hygiene and disinfection in car comes with popularity of car sharing and current pandemic. The emergence of replacement cover seat will be an efficient way to reduce the spread of viruses and bacteria and better protect the health of occupants.

An example is the replacement cover seat co-developed by TACHI-S and SEIREN Co., Ltd. Users can replace seat covers as they like in any time. For car sharing, corporate LOGO or QR code can be printed on the cover of the seat in support of offering commercial services from information spreading and price planning to pre-order and online settlement.



Replacement Cover Seat of TACHI-S

Source: TACHI-S

Lightweight Seat Frame



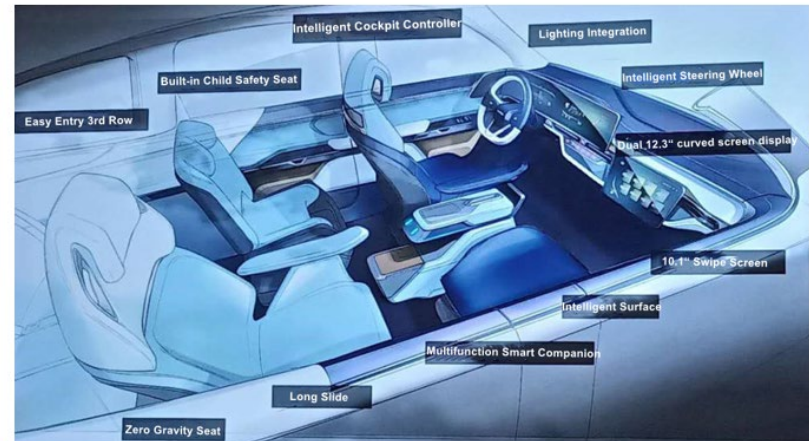
Trends 9: Lightweight

Seats make up 6% of vehicle curb weight, and 5% of total vehicle cost, the second highest share among all components. Lightweight seats are an effective solution to vehicle energy conservation and emission reduction. Reducing the weight of seats lies in use of lightweight seat frames or complete seats.

Trends 10: Zero Gravity

Statistics shows that in autopilot mode, the comfortable recumbent mode (zero gravity) gives users the greatest pleasure. A zero gravity seat is a boon for them to feel less tired during the journey. For example, in June 2020 Yanfeng Automotive Interiors introduced XiM21, a self-developed intelligent cockpit featuring a zero gravity seat that affords a large angle tilt, integrates with massage function and lets passengers relax their body and mind with fragrance from the hidden air outlet.

XiM21 Zero Gravity Seat



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