



China Automotive Steering System Industry Report, 2011-2012

Feb. 2012

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 China Custom, Wind and CAAM.

Abstract

With the continuous advancement of steering technologies, power steering system has gradually become the standard configuration of automobiles. In China, the automotive power steering systems include electric power system, mechanical hydraulic power system, and electro-hydraulic power system. In 2011, mechanical hydraulic system still took a leading position with 56.6% market share in China automotive steering system industry, while electric power system accounted for 24.8% and electro-hydraulic power system 10.5%, higher than those in 2010.

In the future, the installation rate of electric power steering system will keep rising, and it is expected to be more than 40% in Chinese automobile industry in 2015 and even higher in the passenger car market by then.

Japan-based JTEKT, German-based ZF, Japan-based NSK, US-based TRW and other steering system vendors have launched electric power steering systems, and set up production bases in China to meet the huge market demand there.

JTEKT is the world's largest supplier of automotive steering systems. By February 2012, it has owned seven steering system production bases in China, of which 4 ones are engaged in the production of electric power steering systems.

In China, there are some local enterprises with the annual capacity of one million units, such as ELITE and Yubei. ELITE developed the first electric power steering system with independent intellectual property in China in 2001. It has two electric power steering assembly lines annually producing one million units, and it cooperates with China FAW, Changan, Dongfeng, etc.

Major EPS Manufacturers in China

Company Name	Customers	Capacity, 2011 (million units)
Shanghai ZF Steering System Co., Ltd.	Shanghai Volkswagen, FAW-Volkswagen (SVW, SGM)	2
JTEKT Steering System (Xiamen) Co., Ltd.	Tianjin FAW Toyota, Sichuan Toyota	1.20
Yubei Koyo Steering System Co., Ltd.	Camry, Nissan	1
Zhuzhou ELITE Electrical and Mechanical Co., Ltd.	FAW, Changan, Dongfeng, Foton, Changhe Suzuki, FAW Haima, Southeast Motor, Lifan Auto, Hafei Auto	1
Yubei (Xinxiang) Power Steering Co., Ltd.	Dongfeng Motor, Nissan, JMC, FAW-Volkswagen	1
MANDO Chassis Parts (Suzhou) Co., Ltd.	KIA, Beijing Hyundai, Chery, SAIC-GM-Wuling, Chang'an	0.90
TRW Automotive Components (Shanghai) Co., Ltd.	FAW-Volkswagen, Shanghai Volkswagen, Shanghai GM, SAIC, Guangzhou Automobile Group, Changan Ford, Chery, Geely	0.45
Dongguan NSK Steering System Co., Ltd.	Shanghai Volkswagen, FAW-Volkswagen (SVW, SGM)	0.20
Hangzhou NSK Wanda Electric Power Steering System Co., Ltd.	Shanghai Volkswagen, FAW-Volkswagen (SVW, SGM)	0.20
BAICIC Henglong Automotive Steering System Co., Ltd.	BAIC	0.20
Zhejiang Fulin Guorun Auto Parts Co., Ltd.	Geely and Maple	0.10

Source: ResearchInChina

The report treats of the followings:

- Demand for automotive steering systems in China
- Installation of automotive steering systems by car model in China
- Demand for electric power steering systems, mechanical hydraulic steering systems, and electro-hydraulic steering systems in China
- Export and import of automotive steering system parts in China
- Sales volume of major automotive steering system parts enterprises and car models they served in China
- Operation, steering system capacity, output and development of major automotive steering system suppliers in China and the world

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