

China TPMS Industry Report, 2011

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Abstracts

Since all light-duty vehicles in the United States were required to be installed with TPMS on September 1, 2007, the TPMS market has been growing vigorously. In 2011, the global TPMS market scale reached nearly 18 million units, up 13% from previous year, of which the size of the U.S. market accounted for over 50% of the global total. In the recent two years, some countries have begun to follow the practice of the United States, for instance, the European Union and South Korea have exerted legislation for the installation of TPMS; Japan and China are considering stipulating related acts. Driven by regulations and policies, the TPMS market will embrace rapid progression in the upcoming several years.

Schrader, as the world's biggest supplier of TPMS, tapped into the TPMS field in 1991, with annual shipment of 40 million sensors and 33% share in the global TPMS market (even 70% in the U.S. market). Continental is the second largest TPMS supplier, enjoying a market share of 25% worldwide. In addition, TRW, Beru and Lear also acquire some share.

When TPMS Act was issued in the United States in 2005, a number of TPMS vendors emerged in China, they expected that China would introduce a similar act soon, so they took the lead to enter this field and wished the prosperity of the market. But after six years, Chinese market has not seen the expected growth. In 2011, the market size was less than 2 million units, and the installation rate of TPMS was only 8%, so many enterprises had to quit the industry, whereas there were some new entrants.

By 2012, there have been nearly 200 TPMS manufacturers in China, but they were different in technology. Only Shanghai Topsystem, Kysonix, Sate Auto and Top Sun can carry mass-production. Shanghai Topsystem has developed TPMS since 2002, and it has been a supplier of Shanghai Volkswagen Passat. Kysonix introduces technology from USA LIONAX Inc. and TYRESONIC, Inc.. Since 2007, it has exported products to

the United States. Sate Auto and Top Sun have the annual capacity of 2.5 million units and 300,000 units of TPMS respectively, being leaders in China. In addition to these above, most of others cannot conduct large-scale production, and their products are mostly concentrated in the aftermarket.

In January 2011, the approval of Chinese TPMS industry standards facilitated TPMS manufacturers, but Chinese standards are stricter than the current international standards, requiring that TPMS should give an alarm signal for undervoltage in 6s together with stationary undervoltage the alarm, which poses higher technical demand on related producers. Meanwhile, China plans to make a TPMS planning that needs all vehicles to be installed with TPMS by 2017. Once the planning is formally enforced, Chinese TPMS market will see explosive growth. Large local enterprises (Shanghai Topsystem, Kysonix, Sate Auto and Top Sun) as well as international ones (Schrader and Continental) will witness rapid growth.

The report covers:

Global TPMS market size and forecast, as well as market share of major manufacturers;

Development of the TPMS industry in the United States, Japan, South Korea and the European Union;

Current technologies and the latest approved TPMS industry standards in China;

TPMS market size and installation in China;

Development forecast for China TPMS industry, like market size and product trends;

Development (including product lines, capacity, sources of technology, support and operation) of domestic and foreign TPMS manufacturers;

Development (operation and main solutions) of three international TPMS chip suppliers.

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