

# **Global and China Tyre Pressure Monitoring System (TPMS) Industry Report, 2015-2018**

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## **Abstracts**

South Korea, European Union, and Taiwan joined the camp that forces the installation of TPMS in 2014, as the former in Jul 2014 and the latter two in Nov 2014 asked that related auto models must be installed with TPMS, directly boosting global demand for the product. Global installation rate of TPMS reached 36% in 2014, up 6 percentage points from 2013, and is expected to exceed 45% in 2015, creating a demand of more than 40 million sets.

EU now is the focus of global TPMS. On the one hand, its OEM demand for TPMS is expected to hit 16.65 million sets, surpassing the United States as the world's largest market, and on the other hand, considerable AM demand for TPMS is brought about. Harsh winter in many EU countries makes snow tire an additional necessity for new vehicles. Hence, the introduction of mandatory regulations on TPMS in Nov first created demand for TPMS from snow tire. EU will become the world's largest TPMS market, either OEM or AM.

The mainland China compiled its first technical standard for passenger vehicle TPMS in Mar 2015, and carried out a month-long opinion soliciting. The standard will replace original GB/T 26149—2010 with some changes made in the aspects of product scope, product roadmap, and technical standard. The standard is a technically mandatory one but not a requirement on mandatory installation. As of early Sept 2015, the official document has not yet been released.

The mainland China's demand for TPMS comes primarily from OEM market and has grown rapidly during 2014-2015. The demand surged by 78.9% from a year ago to 4.42 million sets in 2014 and is expected to reach 6.67 million sets in 2015, a year-on-year jump of 50.9%. Relying on huge automobile market, China has become the TPMS

market with the greatest potential, attracting a large number of companies.

Top four foreign players- Schrader, Continental, Pacific Industrial, and ZF TRW all have set up factories in mainland China; Taiwanese peers- Orange Electronic, CUB Elecparts, and Mobiletron Electronics all have entered the mainland Chinese market via establishment of factories or offices; Chinese companies- State Auto Electronics, Shanghai Baolong Automotive, Nanjing Top Sun Technology, Kysonix, Hamaton Automotive Technology, Steelmate, and Shanghai HangSheng Industry are stepping up their layout in OEM and AM markets. The Chinese TPMS market will be highly competitive in the future.

Global and China TPMS Industry Report, 2015-2018 by ResearchInChina focuses on the followings:

Global TPMS market size and forecast, market share of major players, and supporting relationship;

Development of TPMS industry in the United States, EU, South Korea, and Taiwan, and market size;

Technical status of TPMS industry and latest approved industrial standards in China;

TPMS market size and installation in China;

Development forecast of TPMS industry in China, including market size, development trend of products, etc.

Development of major foreign and Chinese TPMS producers, covering product line, capacity, source of technology, supporting, operation, etc.

Development of the world's top3 TPMS chip suppliers, including operation, main solutions, etc.

## Contents

### **1 OVERVIEW OF TPMS INDUSTRY**

- 1.1 Definition
- 1.2 Classification
- 1.3 Function
- 1.4 System Composition
- 1.5 Production Process

### **2 DEVELOPMENT OF GLOBAL TPMS INDUSTRY**

- 2.1 Global Overview
  - 2.1.1 TPMS Laws & Regulations
  - 2.1.2 Development History
  - 2.1.3 Market Size
  - 2.1.4 Competitive Landscape
- 2.2 Major Countries
  - 2.2.1 United States
  - 2.2.2 Europe
  - 2.2.3 South Korea
  - 2.2.4 Taiwan

### **3 DEVELOPMENT OF TPMS INDUSTRY IN CHINA**

- 3.1 Status Quo of Technological Development
  - 3.1.1 One-way TPMS
  - 3.1.2 Two-way TPMS
  - 3.1.3 Next Generation TPMS
  - 3.1.4 BMBS Technology
- 3.2 Industrial Standards and Policies
  - 3.2.1 Industrial Standards
  - 3.2.2 Industrial Policies
- 3.3 Market Overview
  - 3.3.1 Coverage
  - 3.3.2 Demand
  - 3.3.3 Structure
- 3.4 Production Capacity
- 3.5 Supporting Relationship

### 3.6 Run Stability Control (RSC)

## 4 MAJOR FOREIGN COMPANIES

### 4.1 Schrader

#### 4.1.1 Profile

#### 4.1.2 TPMS Business

#### 4.1.3 Business in China

### 4.2 Continental

#### 4.2.1 Profile

#### 4.2.2 Operation

#### 4.2.3 TPMS Business

#### 4.2.4 Business in China

### 4.3 ZF TRW

#### 4.3.1 Profile

#### 4.3.2 Operation

#### 4.3.3 TPMS Business

#### 4.3.4 Business in China

### 4.4 Huf Electronics Bretten

#### 4.4.1 Profile

#### 4.4.2 TPMS Business

### 4.5 PressurePro

### 4.6 Omron

#### 4.6.1 Profile

#### 4.6.2 Operation

#### 4.6.3 TPMS Business

### 4.7 Pacific Industrial

#### 4.7.1 Profile

#### 4.7.2 Operation

#### 4.7.3 TPMS Business

#### 4.7.4 Business in China

### 4.8 Denso

#### 4.8.1 Profile

#### 4.8.2 Operation

#### 4.8.3 TPMS Business

## 5 MAINLAND CHINESE COMPANIES

### 5.1 Kysonix Inc.

- 5.1.1 Profile
- 5.1.2 TPMS Business
- 5.2 Shanghai Baolong Automotive Corporation
  - 5.2.1 Profile
  - 5.2.2 Operation
  - 5.2.3 TPMS Business
  - 5.2.4 Subsidiaries
- 5.3 Shenzhen Hangsheng Electronics Co., Ltd.
  - 5.3.1 Profile
  - 5.3.2 TPMS Business
- 5.4 Steelmate Co., Ltd.
  - 5.4.1 Profile
  - 5.4.2 TPMS Business
- 5.5 Shanghai Topsystm Electronic Technology Co., Ltd.
  - 5.5.1 Profile
  - 5.5.2 TPMS Business
- 5.6 Shenzhen Autotech Co., Ltd.
  - 5.6.1 Profile
  - 5.6.2 TPMS Business
- 5.7 Sate Auto Electronic Co., Ltd
  - 5.7.1 Profile
  - 5.7.2 TPMS Business
- 5.8 DIAS Automotive Electronic Systems Co., Ltd.
  - 5.8.1 Profile
  - 5.8.2 TPMS Business
- 5.9 Nanjing Top Sun Technology Co., Ltd.
  - 5.9.1 Profile
  - 5.9.2 TPMS Business
- 5.10 Beijing Sincode Science & Technology Co., Ltd.
  - 5.10.1 Profile
  - 5.10.2 TPMS Business
- 5.11 Ningbo Fuerda Smartech Co., Ltd
  - 5.11.1 Profile
  - 5.11.2 Branches
  - 5.11.3 Main Customers
  - 5.11.4 TPMS Business
- 5.12 China Auto Electronics Group Limited (THB Group)
  - 5.12.1 Profile
  - 5.12.2 TPMS Business

#### 5.13 Huizhou Foryou General Electronics Co., Ltd.

##### 5.13.1 Profile

##### 5.13.2 TPMS Business

#### 5.14 Yangzhou Kooan Electronic Technology Co., Ltd.

##### 5.14.1 Profile

##### 5.14.2 TPMS Business

#### 5.15 VICTON Electronic Technology Co., Ltd.

##### 5.15.1 Profile

##### 5.15.2 TPMS Business

#### 5.16 Jiangsu Yunyi Electric Co., Ltd

##### 5.16.1 Profile

##### 5.16.2 TPMS Business

#### 5.17 Hamaton Automotive Technology Co., Ltd.

#### 5.18 Shanghai Aero-Care Electronic Technology

### **6 TAIWANESE COMPANIES**

#### 6.1 Orange Electronic

##### 6.1.1 Profile

##### 6.1.2 Operation

##### 6.1.3 TPMS Business

#### 6.2 CUB Elecparts

##### 6.2.1 Profile

##### 6.2.2 Operation

##### 6.2.3 TPMS Business

#### 6.3 TTE

##### 6.3.1 Profile

##### 6.3.2 Operation

##### 6.3.3 TPMS Business

#### 6.4 Luhai

##### 6.4.1 Profile

##### 6.4.2 Operation

##### 6.4.3 TPMS Business

#### 6.5 Mobiletron Electronics

##### 6.5.1 Profile

##### 6.5.2 Operation

##### 6.5.3 TPMS Business

### **7 SENSOR SUPPLIERS**

## 7.1 Market Overview

### 7.1.1 MEMS Market

### 7.1.2 TPMS Sensor Market

## 7.2 GE

### 7.2.1 Profile

### 7.2.2 Operation

### 7.2.3 TPMS Solution

### 7.2.4 Business in China

## 7.3 Infineon

### 7.3.1 Profile

### 7.3.2 Operation

### 7.3.3 TPMS Solution

### 7.3.4 Business in China

## 7.4 Freescale

### 7.4.1 Profile

### 7.4.2 Operation

### 7.4.3 TPMS Solution

## **8 SUMMARY AND FORECAST**

### 8.1 Market

### 8.2 Company

## Selected Charts

### SELECTED CHARTS

Relation between Tire Pressure & Fuel Consumption

Production Process of TPMS

Laws and Regulations on the Enforced Installation of TPMS in Major Countries

Worldwide

Global Development History of TPMS

Global TPMS OEM Market Size and Installation Rate, 2009-2018E

Global TPMS OEM Demand Structure by Region, 2015&2018E

Global TPMS Market Landscape, 2014

Supporting Relationship between Major TPMS Producers and Automobile Makers in the World

TPMS OEM Market Size in United State, 2009-2018E

TPMS OEM Market Size in Europe, 2009-2018E

TPMS OEM Market Size in South Korea, 2009-2018E

TPMS OEM Market Size in Taiwan, 2009-2018E

Coverage of TPMS in Passenger Vehicles in China by Price, 2015

Coverage of TPMS in Passenger Vehicles in China by Level, 2015

Coverage of TPMS in Self-owned Brand Passenger Vehicles in China by Brand, 2015

TPMS Installation Rate in China, 2009-2018E

TPMS OEM Market Size in China, 2009-2018E

Type of TPMSs Produced by Major Global and Chinese Companies

TPMS Market Structure in China, 2014&2018

TPMS Capacity of Major Chinese Companies, 2015

Relationship between Local TPMS Producers and Automobile Makers in China

Auto Models Installed with RSC and Their Output in China, 2012-2015

RSC OEM Size and Installation Rate in China, 2012-2018E

Carmakers and Models Supported by Schrader's TPMS Products

Revenue and Net Income of Continental, 2010-2015H1

Revenue Breakdown of Continental by Division, 2010-2015H1

Revenue Structure of Continental by Region, 2010-2014

Gross Margin of Continental, 2010-2015H1

Carmakers and Models Supported by Continental's TPMS Products

Models Supported by Continental Automotive (Changchun)'s TPMS Products, 2015

Revenue and Net Income of ZF TRW, 2010-2015Q1

Revenue Structure of ZF TRW by Division, 2010-2015Q1

Revenue Structure of ZF TRW by Region, 2010-2014



Revenue Structure of ZF TRW by Customer, 2010-2014  
Gross Margin of ZF TRW, 2010-2015Q1  
Carmakers and Models Supported by ZF TRW's TPMS Products  
Carmakers and Models Supported by TRW Automotive Components (Shanghai)'s TPMS Products, 2015  
Carmakers and Models Supported by Huf Electronics Bretten's TPMS Products  
Revenue and Net Income of Omron, FY2010-FY2015Q1  
Revenue Structure of Omron by Division, FY2010-FY2015Q1  
Revenue Structure of Omron by Region, FY2010-FY2015Q1  
Carmakers and Models Supported by Omron's TPMS Products  
Revenue and Net Income of Pacific Industrial, FY2011-FY2016Q1  
Revenue Structure of Pacific Industrial by Division, FY2011-FY2016Q1  
Revenue Structure of Pacific Industrial by Region, FY2011-FY2015  
Gross Margin of Pacific Industrial, FY2011-FY2016Q1  
Carmakers and Models Supported by Pacific Industrial's TPMS Products  
Sales and Profit of Denso, FY2011-FY2015  
Sales Breakdown of Denso by Region, FY2011-FY2015  
Customer Structure of Denso, FY2014-FY2015  
Carmakers and Models Supported by Denso's TPMS Products  
Revenue and Profit of Shanghai Baolong Automotive, 2012-2014  
TPMS Capacity, Output and Sales Volume of Shanghai Baolong Automotive, 2012-2014  
Net Income of Shanghai Baolong Automotive's Subsidiary, 2012-2014  
TPMS Products of Shanghai Topsystm  
Main Configurations of TPMS Products of Shanghai Topsystm Electronic Technology  
TPMS Product Lines of Shenzhen Autotech  
Indicators of TPMS Products of Shenzhen Autotech  
Main Businesses and Production Bases of THB Group  
Business of Huizhou Foryou General Electronics  
Main Configurations of TPMS Products of Kooan  
Revenue and Profit of Orange Electronic, 2013-2014  
Revenue Structure of Orange Electronic by Product, 2014  
Revenue and Profit of CUB Elecparts, 2013-2014  
Sales Breakdown of CUB Elecparts by Product, 2014  
Revenue and Profit of TTE, 2012-2015  
Revenue Structure of TTE, 2014  
Production Bases of TTE  
Main Customers of TTE  
Revenue and Profit of Luhai Group, 2013-2015

Revenue Structure of Luhai Group by Region, 2013-2014  
Revenue and Profit of Mobiletron Electronics, 2013-2015  
Revenue Structure of Mobiletron Electronics by Region, 2013-2014  
Global Top10 Automotive MEMS Suppliers, 2014  
Revenue and Profit of GE, 2014-2015  
Global Ranking of Infineon's Three Businesses, 2015  
Revenue of Infineon, FY2014-FY2015  
Revenue and Profit of Freescale, 2010-2015  
Global TPMS OEM Size, 2009-2018E  
Global and China's TPMS OEM Installation Rate, 2009-2018E  
TPMS Factories Established in China by Foreign-funded Companies

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